

TOURISM DEVELOPMENT OPPORTUNITIES

Renfrew · Kingston Zone

Trenton · Cornwall Zone

De Leuw Cather

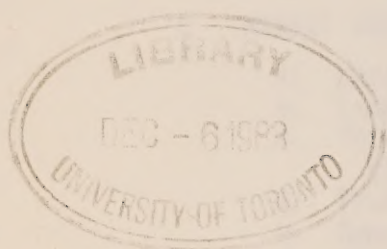
TOURISM DEVELOPMENT OPPORTUNITIES

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Trenton·Cornwall Zone Renfrew·Kingston Zone

PREPARED FOR:

THE ONTARIO MINISTRY OF INDUSTRY
& TOURISM



By:

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INTRODUCTION

In 1976 the Ministry of Industry and Tourism of the Province of Ontario commissioned an overview of tourism development entitled, "Tourism Development in Ontario: A Framework for Opportunity". This document suggested a province-wide strategy for tourism development with particular emphasis on private sector development. The Study identified a set of tourism development zones as well as connecting corridors and supporting tourism hinterland. The Study suggested that the tourism development zones offer interesting opportunities for private sector tourism development. Seventeen zones in all were identified. This present Study considers two of these Zones -- the Trenton/Cornwall Zone and the Renfrew/Kingston Zone. (see Map No.1) These two Zone Studies were undertaken simultaneously and the results are presented in this document.

The purpose of this Study is:

1. To identify development opportunities primarily of interest to the private sector in the two Zones which should be of interest either immediately or within the next five years. These opportunities are consistent with the images, resources, and potential markets of the Zones.
2. To carry out preliminary feasibility studies of some of those opportunities.
3. To suggest phasing for the opportunities in a general way, but not to establish priorities.
4. To recommend a strategy to implement the opportunities.
5. To consider briefly possible directions for tourism development in the period after the first five years.

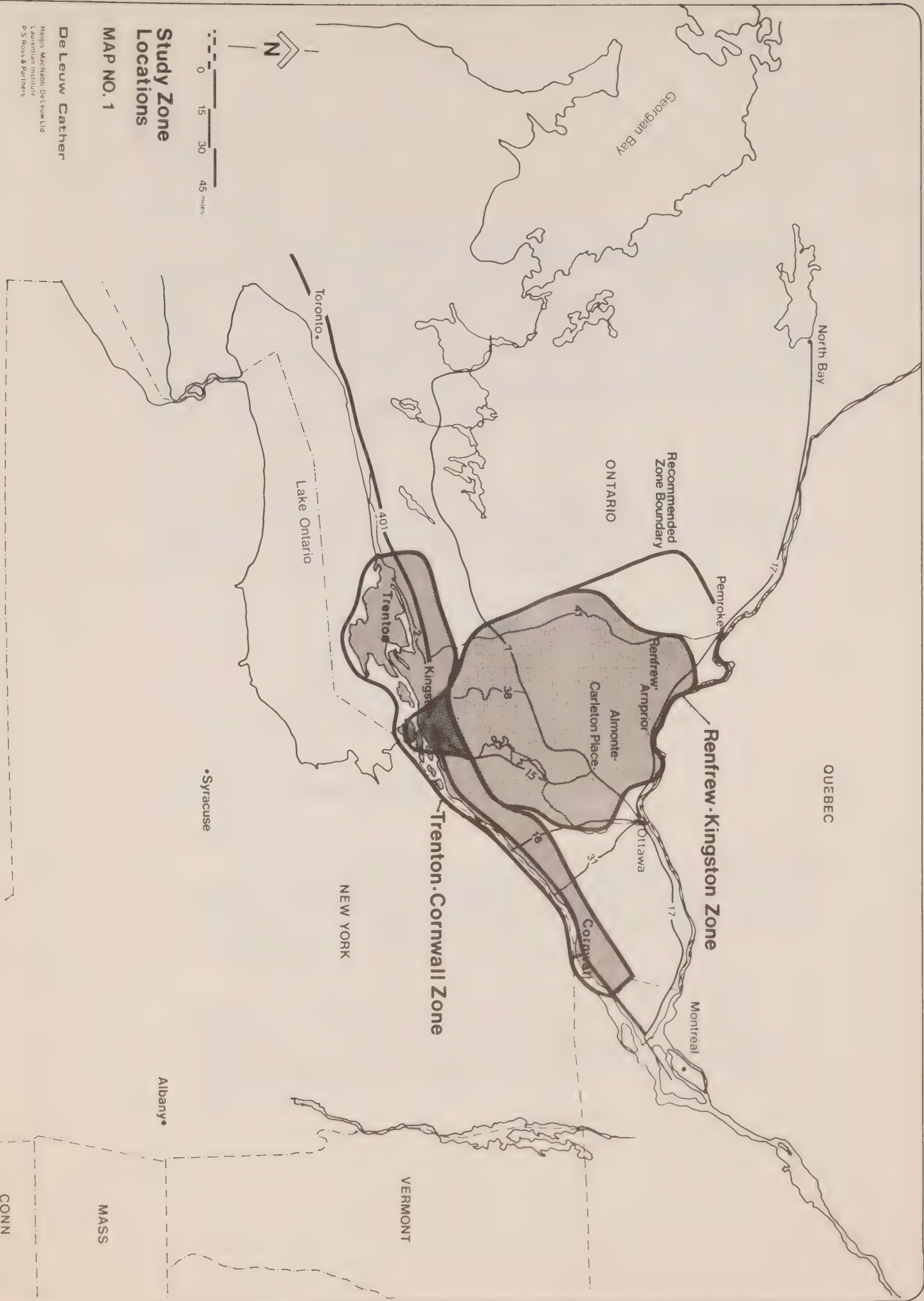
This Study should not be construed as presenting a complete and all-inclusive list of all private sector opportunities. The way should always be left open for other sound tourism development/investment proposals. The opportunities identified in this Study have not been the subject of detailed socio-economic or environmental impact evaluations. Such work may follow when detailed site-specific proposals are undertaken.

Both the Trenton/Cornwall and Renfrew/Kingston Zones have strong existing images. Therefore, "image building" was not considered appropriate or necessary for the Zones; instead, an identification of the existing images and related theming was considered more important. The Study recognizes but does not dwell on some of the problems in the industry throughout Ontario and other parts of Canada; instead attention has been directed to opportunities which, when realized, may be the best way to combat many of the industry's problems.

It is not within the scope of this Study to recommend a "Comprehensive Tourism Plan for Eastern Ontario" which deals with all the complex economic and social interrelationships and impacts caused by the tourism industry. A "Plan" of this far-reaching nature would burden the private sector with a further array of policies, constraints and rigidities which is surely not a desirable end. Nevertheless, careful attention has been directed to the Ministry of Industry and Tourism's broad goals as well as those of other Ministries which have a role to play, concern or interest in sound tourism development. Consequently, this document, although its principal focus is on private sector development, should be of interest to various agencies of government which have an influence on or interest in tourism development.

Additional copies of this document are available from the Ontario Ministry of Industry and Tourism at:

Division of Tourism,
Ministry of Industry and Tourism,
Hearst Block,
Queen's Park,
Toronto, Canada,
M7A 2E5.



SUMMARY

Scope of Study

This report presents the results of a study of the present and future tourism markets and resources in the Trenton/Cornwall, and the Kingston/Renfrew "Tourism Development Zones" in Eastern Ontario. (See Maps No. 1 and 2.) Investment opportunities of potential interest to the private sector are identified and evaluated. Guidelines and development principles are suggested which should be of interest to both the private sector and various levels of government. The study suggests a strategy which concentrates on implementing the opportunities identified, with particular emphasis on the role of the Ministry of Industry and Tourism.

One Important Definition

The reader will frequently encounter the term "tourist" throughout this document. This term includes more than "pleasure travellers". Business and personal travel beyond 25 miles and visits from out of province are included. Specifically:

A tourist is any Ontario resident travelling in excess of 25 miles from home for any purpose other than commuting to work plus any non-resident (from other provinces, U.S.A. or other foreign countries) who enters Ontario for any purpose other than commuting to work.

Findings and Recommendations

a) Zone Boundaries

Some zone boundary adjustments are suggested. The Renfrew/Kingston Zone should be expanded to include the City of Pembroke and other lands in Renfrew County lying west of the original zone boundary as indicated in the provincial overview "Framework for Opportunity". (See Maps No. 1 and 4.)

The two Zones should be treated as a single unit for purposes of tourism development. The fact that the City of Kingston is in both Zones, the strong linkage from the Rideau Lakes to the Trenton/Cornwall Zone, plus the potential for interzonal relationships, are factors leading to this conclusion.

b) Opportunities

Development opportunities reviewed include:

- Vacation Village
- Destination Resort
- Resort Hotel
- Urban Hotel
- Heritage Inn
- Large Commercial Attraction
- Small Commercial Attraction
- Others
 - . Marina/Marine Touring Complex
 - . Commercial Campground

Some of these projects show immediate potential. For others, certain current constraints may hamper near-term development. The potential investor/entrepreneur should use this report's preliminary feasibility studies as a starting point for the detailed evaluation which is an essential preliminary to any investment decision. Other opportunities requiring smaller capital expenditures are also suggested. The capital expenditure in total is significant, representing many millions of dollars. These investment opportunities should have a significant positive impact although no specific economic impact studies were carried out.

c) Timing of Opportunities

The capital expenditures involved in these opportunities would take place over a period of 10 to 15 years. Suggestions as to the likely timing of the projects are set forth. This timing is based on estimated profitability. It should not be confused with any priority based on considerations beyond profit.

d) Cooperation

Cooperation among operators is discussed; cooperation to exploit the existing images, develop local themes and attempt to organize packages using facilities and services offered by local individual operators.

e) Implementation

An implementation strategy is recommended, mainly involving the Ministry of Industry and Tourism. Following adoption of this report, the Ministry should work with other provincial Ministries to establish broad development guidelines and more detailed standards and criteria related to the identified opportunities.

The Ministry should inform the private sector of the opportunities identified in this Study as well as the recommended principles and guidelines. The Ministry should assist operators/investors/entrepreneurs who demonstrate interest in pursuing the recommended opportunities. The Ministry should also assist investors to gain necessary government approvals for those projects consistent with the findings of this report.

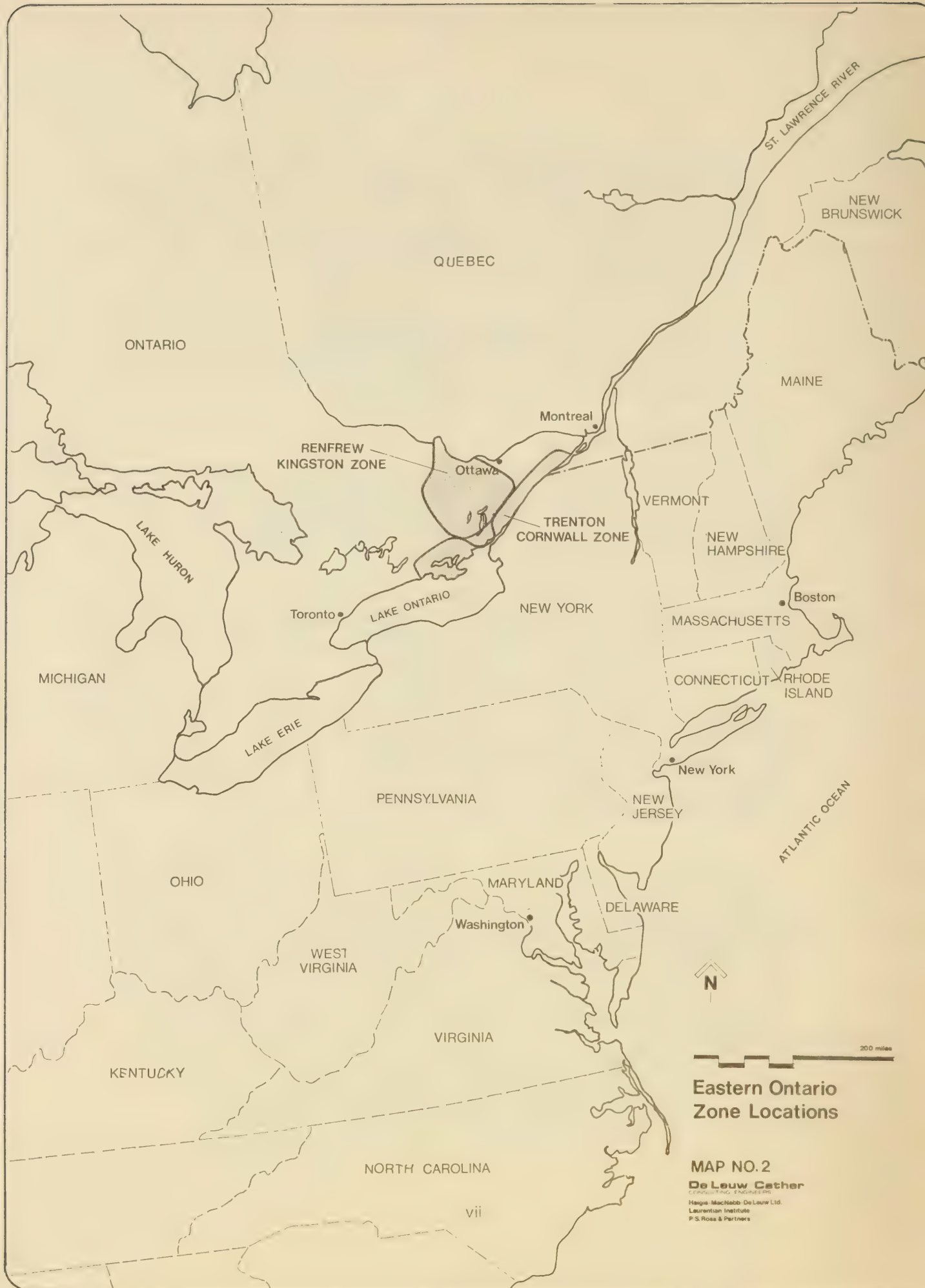
Suggestions for groups and agencies other than the Ministry of Industry and Tourism are contained in the study - including existing operators, municipal governments, certain other Provincial Ministries, and the Central and Eastern Ontario Travel Associations.

Images and Resources

The area already possesses strong images that can be capitalized on in tourism development. Heritage and waterways may be the words best used to portray the strong images existing in the area. These are images which can be used for theming and promotion. Detailed theming in individual areas of the two Zones is suggested.

The area offers an opportunity to experience and enjoy the heritage of one of the oldest settled areas in Ontario - a setting still beautiful and natural, capable of supporting outdoor recreation activities and with potential for new growth and expansion; and a heritage whose highlights include early European settlements, 19th century architecture, logging, timbering, United Empire Loyalists, and the War of 1812. The area has strong competition - the Laurentians of Quebec, the Adirondacks of New York and the Green and White Mountains of New England - but it is a strong competitor with its quaint village settings, its heritage, urban centres harbouring the new and the old, variety of lakes and rivers, the warm water fisheries, water cruises, and the unique setting and architecture of the Thousand Islands.

The area already has a substantial established tourism base and is near large markets with further potential. It would be misleading to imply that the area is without problems. Those problems, however, are much like those affecting other parts of the province, i.e., seasonality, rising costs, higher fuel prices, environmental and development constraints, and the general economic outlook. This report has not attempted to and does not claim to have answers to these problems but it is believed that some of the opportunities and strategies suggested can contribute to the growth of the area's tourism economy.



**Eastern Ontario
Zone Locations**

MAP NO.2
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Consulting Engineers
Hague MacHabb De Louw Ltd.
Laurentian Institute
P.S. Ross & Partners

ACKNOWLEDGEMENTS

A number of individuals, too numerous to mention individually, have assisted in the preparation of this report. However, particular appreciation must be given to the staff of the Ministry of Industry and Tourism who, in addition to providing considerable data, have also contributed time and effort in finalizing the document. A special note of appreciation must also be given to the Ministry of Transportation and Communications, Regional Transportation Planning Office, for their assistance in providing traffic data that proved invaluable to the report.

Other agencies who made specific comment or who were called upon for assistance include:

- Secretariat for Resources Development (Ontario)
- The Ontario Ministry of Natural Resources
- The Ontario Ministry of Environment
- The Ontario Ministry of Housing
- The Ontario Ministry of Treasury, Economics and Intergovernmental Affairs
- The Ontario Ministry of Culture and Recreation
- Canada-Ontario Rideau-Trent-Severn Study Committee (CORTS)
- Eastern Ontario Development Corporation (EODC)
- Eastern Ontario Travel Association
- Central Ontario Travel Association
- Canadian Government Office of Tourism
- Parks Canada

All of the persons interviewed through our Community Contacts Program provided valuable input to this report. A list of these persons, officials and agencies is included in Appendix E of this document.

SECTION I -- PERSPECTIVE

A. ZONE DESCRIPTIONS

The two Eastern Ontario Tourism Development Zones covered in this Study are Trenton/Cornwall and Renfrew/Kingston. The Ottawa zone is not included. The Trenton/Cornwall Zone is a linear corridor serviced by Highway 401 stretching from the Trenton area in Hastings County to the Quebec border along the St. Lawrence River. (See Map No. 3.) The Renfrew/Kingston Zone has a north-south orientation including the City of Kingston in the south and parts of Renfrew County in the north. This Zone includes most of Lennox and Addington and Frontenac Counties and Lanark County and a large portion of southern Renfrew County, as well as a northern portion of Leeds and Grenville County. Within the Trenton/Cornwall Zone the concentration of tourism use is in the Thousand Islands area and within the City of Kingston and west-erly to the Bay of Quinte area. In the Renfrew/Kingston Zone the major concentration of tourism use and development is in the Rideau Lakes area. Throughout both Zones, the tourism uses are oriented to water-based recreation. One conclusion of our Study is that the Renfrew/Kingston Zone should be enlarged to include the City of Pembroke and those areas lying south and west of the City. This is shown on Map No. 4. The additional area was not studied in any detail as part of the Tourism Zone Studies; however, the development guidelines, principles and project opportunities should be examined by those with a particular interest in the Pembroke area.

Because of the Zones' extensive areas and because of variations within each Zone, a set of nine sub-zones was delineated. These are reviewed below. The comments include opinions of those interviewed in the community contacts program with respect to tourism potential and problems.

a. Quinte Sub-zone

Quinte is the most westerly Sub-zone and includes Prince Edward County and the southern portions of Hastings and Lennox and Addington Counties plus the Brighton/Presqu'ile area of Northumberland County. This Sub-zone is centered on the Bay of Quinte which has good potential for boating and shoreline recreation. It includes the communities of Trenton, Belleville and Napanee and has a significant tourist trade at present.

The City of Belleville is the major service centre for the Sub-zone. This Sub-zone includes a significant entry point for tourists arriving from the West. The area presently contains marinas and boating facilities and a number of public parks. Accommodation is centered on the service areas of Belleville, Trenton, Napanee and Picton. Highway 401 is a major corridor to and through the Sub-zone. The number of quality accommodation and entertainment facilities has not been sufficient to retain visitors in the area.



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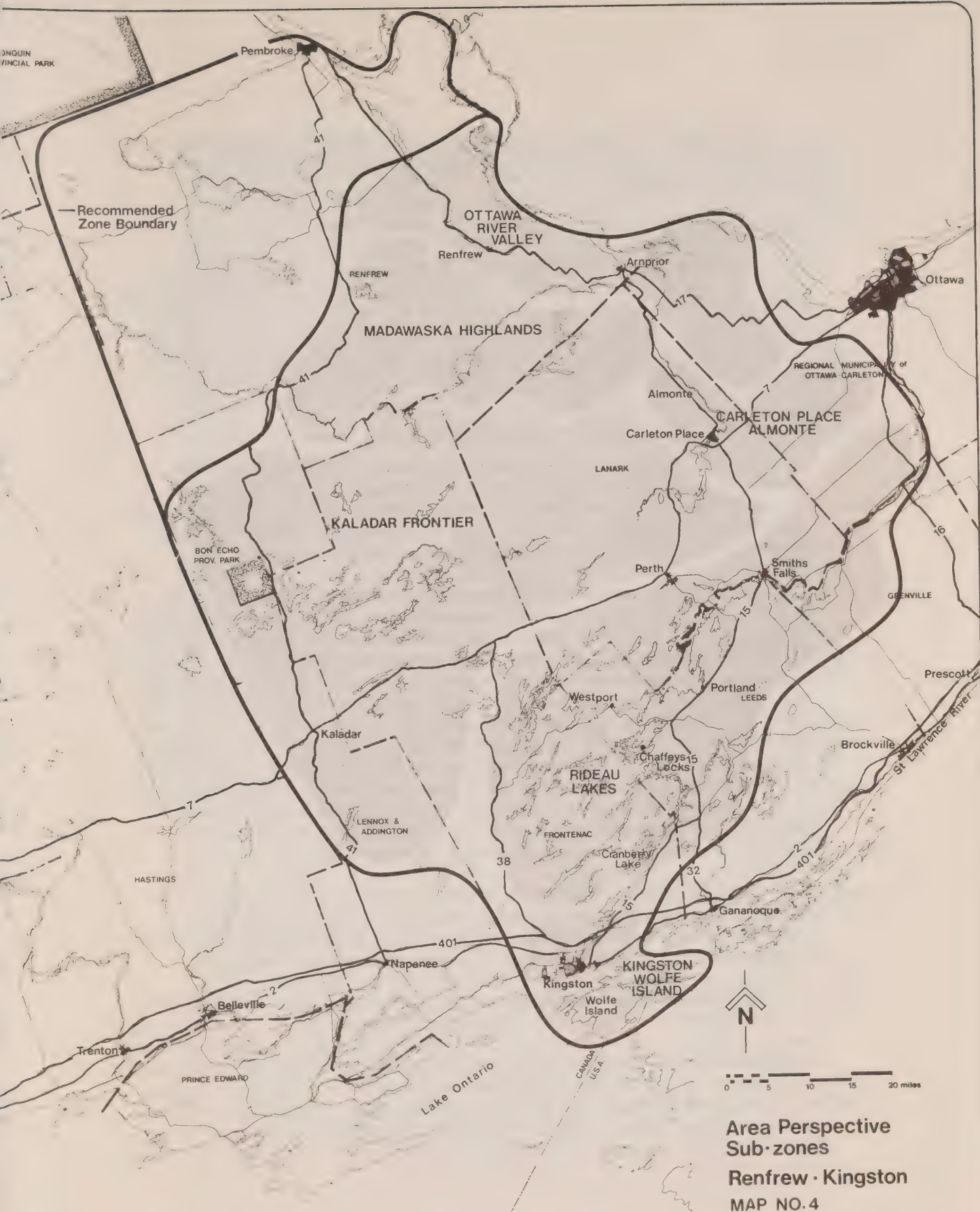
**Area Perspective
Sub-zones**

Trenton-Cornwall

MAP NO.3

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**Area Perspective
Sub-zones
Renfrew · Kingston
MAP NO. 4**

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P.S. Ross & Partners

The general consensus in the area is that its potential has not yet been fully realized and that larger scale development would be warranted.

b. Kingston/Wolfe Island Sub-zone

This Sub-zone is in both the Trenton/Cornwall and Renfrew/Kingston Zones (see Map No.1). This important crossroad position emphasizes Kingston's unique location as the focus of transportation and recreation activities for Eastern Ontario. Within the area, Kingston occupies a critical central position and has the potential to develop into a significant urban destination equidistant from Toronto and Montreal and in close proximity to a U.S. market.

Wolfe Island represents a unique rural setting with some beach areas, close to the City of Kingston. Access to the Island is by ferry and boat, although the possibility of a bridge connection has been studied. Such a connection would link the Island with both Kingston and the U.S. mainland.

There are a number of attractions especially in Kingston itself including Old Fort Henry. Kingston, along with Gananoque, can be considered as a gateway to the Thousand Islands. Tourism in the Kingston area was perceived by those contacted as quite important. The City of Kingston is becoming increasingly aware of the importance of income flow attributable to tourism. Consequently, there are a number of plans underway for new developments in the area. One of the most important is the proposed new motel/hotel to be located on the Lake Ontario shoreline opposite City Hall. It is planned that this will be a low profile building that ideally will incorporate convention facilities and good entertainment facilities. This accommodation facility, however, does not capitalize on the total potential of the market.

Another major complex is being proposed to the east of the downtown area on the Cataraque River. This would include a hotel with convention centre, office space and possibly shopping. A number of smaller hotel developments are being considered.

The historical importance of Kingston offers opportunities for development of quality, historically-based types of facilities. These would be in keeping with the City's historic atmosphere and would be more likely to complement the City's existing development than other types of commercial ventures. It is felt by a number of persons that the City of Kingston can play a stronger role in the promotion of tourism and associated developments than it has in the past. Toronto and Quebec tourist trade is on the increase.

The recent Olympic Games attracted a number of tourists, many of whom visited other areas besides Kingston. The entertainment facilities that were part of the Olympic programs were very successful. The entertainment aspect of the tourism industry has been somewhat overlooked in Kingston and Kingston residents go across the river to the nearby United States centers to take advantage of facilities that are presently not available in the Kingston area.

Many operators in the area felt that Queen's Park and the Ministry of Industry and Tourism could be doing more to promote Ontario with specific emphasis on the Kingston area. There was concern that the existing promotion was not being well directed. It was suggested, for instance, that the Montreal-Quebec market was one that had great potential but is not now being sufficiently exploited.

c. The Thousand Islands Sub-zone

The Thousand Islands Sub-zone stretches from Gananoque to Brockville. Its dominant feature is the St. Lawrence River. The island atmosphere combined with a rural environment and a magnificent interface between the St. Lawrence River and the rocky mainland are major natural attractions. It is one of the oldest and best known tourism areas in the northeast. It has been visited over the years by millions of persons from throughout the world. It, perhaps more than any other Sub-zone within the Eastern Ontario Tourism Zones, continues to reflect "the way things were" in the late 19th and early 20th Centuries. Here Victorian mansions dot the landscape and are a major tourist attraction. The location is much sought by those seeking seasonal, residential accommodation. Extremely high land values prevail in the area. The area is not without its problems. The seasonal nature of tourism has affected tourist operators for years. The climate does not warrant a major four season development built on intensive winter recreation uses. There is also a shortage of major commercial attractions in the immediate area. In addition, the differences in costs of operation between the Canadian and U.S. sides of the river could have serious repercussions. This is especially true in boat oriented activities. The marina operations on the Canadian side find it hard to compete with their American rivals.

Parks Canada have some tentative plans for the Thousand Islands area but the exact nature of these plans is not yet known. It would appear that the residents of the area see little to be gained from designating the total area or even a major part of it as a National Park. Some large tracts of land both on the mainland and the islands are owned by the St. Lawrence Parks Commission, but little use is being made of these properties at present for either public active or passive recreation.

d. St. Lawrence Valley Sub-zone

This Sub-zone encompasses that area of the St. Lawrence North Shore from west of Prescott to the Ontario/Quebec border northeast of Cornwall. The area has access to a very large tourist market in the Montreal area and also in the Ottawa/Hull region. The major hindrance at this time to a more extensive tourism industry is the lack of specific attractions in the area.

The problem of high prices, compared to the United States, also hinders tourism development in the area. Limited promotion efforts were claimed to be a factor affecting the area's tourism business.

This Sub -zone contains the urban centres of Prescott, Morrisburg and Cornwall. Tourism development within these urban centres would undoubtedly assist in attracting higher tourist volumes. The Town of Prescott is presently involved in preliminary stages of a waterfront development scheme. It has also undertaken plans for downtown renovation. The heritage buildings and historical resources in the Prescott area are most significant and should be protected and developed for tourism purposes. Development of Augusta and Edwardsburgh Townships could emphasize the local Indian sites and burial grounds.

The City of Cornwall has also undertaken some major and extensive redevelopment efforts that can be instrumental in improving tourism in the area. The most significant of these is the new recreation complex.

Fishing was a major activity which has attracted visitors, but is not of the quality that it was in earlier years. Environmental controls will have to be exercised as they pertain to shoreline development if fishing is to survive and flourish. Likewise, more intensive programs by the Ministry of Natural Resources to improve habitat and increase fish production are necessary.

Revenue from tourism would improve if those tourists in the area spent a number of days in the region as opposed to passing quickly through. Presently there is little to keep visitors busy and enthusiastic for any length of time. The Upper Canada Village in Morrisburg is popular but the area cannot rely upon a single attraction. Additional attractions would greatly increase the area's tourist-attracting capabilities. The nearby large markets should support major commercial attractions in the area.

e. Rideau Lakes Sub-zone

This area has had an important tourist trade for many years, and like the Thousand Islands area in the Trenton/Cornwall Zone, has strong and enduring images. Tourism in this area is centered on the Rideau Lakes complex and associated waterways and canal systems. The majority of activities are related to water: fishing, boating, cruising, canoeing, sailing, swimming, and similar activities. Here also, like the Thousand Islands, seasonal residential development is a significant tourist use for the area. Tourist facilities provide meals, accommodation and often guides are available for fishing parties. The majority of the facilities have been established for some years and no new major developments have been initiated recently. Tourism demand in this area is expected to increase. This growing demand can form the base for further development.

The tourist dollar is important to the area's economy. Communities such as Westport, Portland and Chaffey's Locks are highly dependent upon the tourist industry. Some of the larger communities, such as Smiths Falls and Perth, are also important tourism centres and, likewise to a large extent, dependent upon the tourism industry.

The emergence and success of new developments will depend in large measure on the controls imposed by land use plans and By-laws throughout this area. Any new projects of a large scale will have to meet stringent environmental controls.

Although a number of existing operators have indicated a willingness to expand, there appears to be no present plans for specific developments in the area. A proposal for a year-round hotel/golf course with seasonal and permanent residential accommodations on the Beupre Island/Cranberry Lake location apparently has been shelved.

The communities in the area, in particular Smiths Falls and Perth, offer many opportunities for heritage development and preservation that could be significant in attracting tourists to the area. Both communities have given serious thought to downtown renovation. It appears that the Town of Perth will re-activate such plans in the near future.

f. Carleton Place/Almonte Sub-zone

In the Carleton Place/Almonte region, the major attraction for tourists is the scenic setting. The Sub-zone is close to Ottawa, a major metropolitan area, and easily accessible by Highways 7 and 15. The area is consequently very popular for day trippers and weekend vacationers, many of whom have summer cottages in the area. Ottawa provides the greatest number of tourists to this area.

There is limited hotel and motel accommodation available in the larger centres and there are few attractions to make the area a tourist destination. This situation could possibly be changed with more attention given to the rural atmosphere, specialty craft stores, and the unique heritage of the area.

The Town of Carleton Place has been actively engaged in a downtown renovation scheme. Through such a scheme, the architectural heritage existing in the Town might be preserved and capitalized upon to the benefit of the tourist industry. The area does offer accommodation for tourists seeing other parts of Eastern Ontario.

g. Ottawa River Valley Sub-zone

This Sub-zone includes the Towns of Renfrew and Arnprior and is served by the Trans Canada Highway (Highway 17), much of which has a new alignment which facilitates access to the area. Based on our analysis of this Sub-zone and the whole of the Renfrew/Kingston Zone, it is felt that it should be expanded to include the City of Pembroke as well as areas in Renfrew County lying to the south and west of Pembroke. This area is close to Ottawa and a good road network makes it easily accessible.

The main attractions of the area are the rural landscape and the evidence of the rural way of life conducted in natural settings. Along Highway 17, hotels and motels are found in the urban centres. These are generally not recreational tourist oriented but are oriented towards commercial travellers. There are campgrounds and trailer parks, but there is little pattern to their location. The fishing has been an important tourist activity but local operators are concerned about the decline in the quality of fishing. The commercial attractions of interest in the area are the Champlain Storyland near Renfrew, and the Bonnechere Caves. There are also fairgrounds at both Arnprior and Renfrew. Pembroke acts as an important service centre for the area. Such activities as cross country skiing, white water canoeing, other canoeing and sailing are growing in popularity in this area and there are opportunities to develop these activities. The "Timbertown" project has created considerable interest in the area. This project is a theme crafts park based upon the area's timbering and logging heritage. Successful development of Timbertown will have a very significant impact on the tourist industry.

Local operators appear to be generally concerned about the need for control of whatever development may occur in the area. They state that poor promotion is a problem but that this could largely be overcome with increased cooperation between tourist operators. The lack of priority given to tourism by local municipalities and the County was an opinion expressed during the contact program, although recent activity in this direction may help to alleviate this concern. The concentrated effort of municipalities in development of such things as swimming facilities, boat launching areas, and other facilities would do a lot to attract people to stay longer in the area. It would also encourage the private operators.

h. Madawaska Highlands Sub-zone

This Sub-zone has particularly splendid scenery and the most rugged landscape in the Renfrew/Kingston Zone. Opportunities are related to the scenic qualities, and recreational potential, particularly downhill skiing. The Sub-zone is easily accessible to both Toronto and Ottawa markets but lacks the quality of type of development to promote large traffic volumes. It is also hampered by the necessity to compete directly with already established facilities in Western Quebec and the Northern United States.

i. The Kaladar Frontier Sub-zone

The wilderness aspect of this region attracts many people who either come specifically for the fishing and hunting or for the scenic attractions offered by the abundance of lakes and rivers in the area. However, there has been a decline in the fish stock of some lakes. The hunting season for certain species has recently been shortened. Like the Madawaska Highlands, the landscape is rugged. There are established resorts in this area, some of which are considering limited expansions, but there are no major projects anticipated.

Presently the majority of tourists are from the Kingston and Eastern Ontario regions. Recent government controls on foreign ownership appear to have affected the number of American cottagers owning land in the region. Because of its location, it would appear that the opportunities for expanded tourism development and growth in this area are best linked to the opportunities of those areas lying further to the south and east.

B. TOURISM MARKETS

a. The Product Offered to the Market

This brief section summarizes the "product" currently offered the tourist. It serves as a pre-amble to subsequent sub-sections which discuss the tourism markets for the two Zones.

Much of the present tourism in the Zones is based on their natural resources. Water-based recreation opportunities adjacent to the major highway network have been major tourism building blocks for the development of parks, campgrounds, cottages, marinas and seasonal accommodation. The Lake Ontario beaches in Prince Edward County are among the best in Eastern Canada while the fresh water boating capability of the Thousand Islands area and the St. Lawrence River is among the highest in Eastern North America.

More recently downhill skiing in the Madawaska Highlands has added a four season dimension to summer based tourism. To a lesser extent other forms of winter based recreation activity have supplemented the summer seasonal base in the Rideau Lakes and Kaladar Frontier Sub-zones.

The highway network is basic to tourism development in the Zones. The MacDonald-Cartier Freeway (Highway 401) and Highway 2 link the Zones to the major markets such as Toronto and Montreal while the bridges at Ivy Lee, Prescott and Cornwall provide links to the U.S. market. At least 12 major highways provide northward linkages to the rest of Eastern Ontario with 15, 16 and 31 providing direct linkages to the Ottawa market. Highways 7, 17 and the MacDonald-Cartier Freeway (Highway 401) link the Zones to the major east-west markets in Canada as well as the U.S. market. North-south linkages within the Zones are provided by Highways 41, 38 and 15 which serve to distribute tourists to destinations within the Zones from the east-west corridors.

The historic settlement features of the Zones are becoming increasingly important tourist attractions. The dominant facilities in this regard are Old Fort Henry in Kingston, Fort Wellington in Prescott and Upper Canada Village near Morrisburg. Attendance at these three facilities is about 600,000 people a year. There are many historic buildings and museums, old mills and examples of early architecture throughout the Zones. Early settlement architecture around Merrickville, Carleton Place, Almonte, Perth, Kaladar and Kingston is attracting attention from both enthusiasts and interested tourists.

In the eastern part of the Zones, the St. Lawrence Seaway with its intricate lock system and the steady flow of ships continues to be a tourist attraction.

Year-round tourism facilities serve business and recreational traffic to the urban centers in the Trenton/Cornwall Zone and traffic along the MacDonald-Cartier Freeway. Seasonal facilities cater both to destination oriented tourists as well as tourists moving through the Zones to other destinations.

b. Economic Comments

Although tourism is not a major employer on an overall basis, it is a significant employer in a number of Sub-zone locations and, in fact, forms the economic base of many areas within Eastern Ontario. There is, of course, also a significant increase in employment during the summer when the seasonal facilities in this area are open. Early tourism development in both Zones began with summer resort and cottages in both the Thousand Islands area and the Rideau Lakes area. After the construction of Highway 401, some of the patterns of tourism development changed in the area. New accommodation and food services were oriented to urban centers and Highway 401 interchanges while development along the water focused mainly on public parks and campgrounds and marinas.

In both Zones, the tourism industry reflects a continuous evolution of small-scale businesses reacting primarily to opportunities in the area. It is worthwhile highlighting the "reactive" nature of the industry. The industry might be termed "demand driven"; i.e., the supply increases as a demand makes itself felt. In our opinion, there is a good probability that the creation of a supply of well conceived tourism facilities would bring out a corresponding latent demand. However, our market projections indicate that demand primarily based on historic trends is sufficient to support the identified opportunities. The Industry has been built by owner/managers and their families with their own or local capital. While some of these facilities have changed ownership over time, the pattern of ownership and operation remains essentially the same. The presence of internationally known chains or franchises is presently confined to the immediate area of Kingston. There is, in addition, a major public investment in parks and historic sites and related infrastructure in the Trenton/Cornwall Zone.

During the 70's, there has been a major thrust both in public investment areas and more investment in winter recreation facilities. New urban centered hotels have been built and numerous campgrounds and trailer parks for both transient campers and for seasonal users as an alternate to the increasing cost of cottages were also developed quite extensively in the area during this period.

C. MARKET INDICATORS

The market analysis considers the following factors:

- a. Local population and its growth,
- b. External market population and its growth,
- c. Total trips/social recreational trips to the area,
- d. Tourism expenditures,
- e. Geographic origin of tourists,
- f. Mode of travel,
- g. Major activities pursued,
- h. Accommodation used.

a. Local Population and Its Growth

Table 1.1 shows present and projected resident populations for the two Zones. Growth rates vary by Sub-zone but much of the growth will occur in the urban centers. The overall compound annual growth rate for the 5 years, 1971 to 1976 has been 1.2% per annum. It is worth noting that in order to reach the provincial projections for 1986, the total absolute growth over this 10 year period for the entire two Zones is only 19,000, or a compound annual growth rate of 0.4%. This slow growth will have little impact on the projected market for tourism facilities. However, the absolute population level of about 500,000 is significant.

b. Market Population and Its Growth

This topic has been dealt with from two viewpoints: First, the market population for day trips, and second, the market population for vacation trips. Chart 1 indicates the population within one hour's drive for each of the nine Sub-zones. The average projected growth rate to 1986 is 1.8 % per annum. When applying this percentage to the population within one to two hour's drive, it shows an increase in absolute numbers of 740,000. This number will have significant impact on the market opportunities in both Zones.

Table 1.2 gives the market area population within vacation distance from the Zones. The market population is in the radius of approximately 175 miles of the Zones. It shows that in 1974 the total market area population was 59 million. Projected to the year 1986, the population was 66 million, which represents an annual growth rate of 1.0% and an absolute increase of 7 million. Here again, these numbers add to the potential market and have a significant impact on the opportunities for tourism in both Zones.

TABLE 1.1 -- LOCAL POPULATION

	1971 ²	1976 ²	1986 ³	2001 ³
Renfrew/Kingston Zone	203,015	218,266	226,376	241,993
Trenton/Cornwall Zone	347,332	362,757	382,588	407,942
TOTAL Both Zones ¹	463,101	490,835	509,733	544,559

Notes:

1. Zones do not add due to common Kingston/Wolfe Island Sub-zone
2. Source -- Census Canada 1971, 1976
3. Source -- "Ontario's Changing Population" Vol.2, A Background Report, (Assumption B)
Ministry of Treasury, Economics and Intergovernmental Affairs 1976

TABLE 1.2 -- MARKET AREA POPULATION FOR VACATION TRIPS
FOR BOTH ZONES

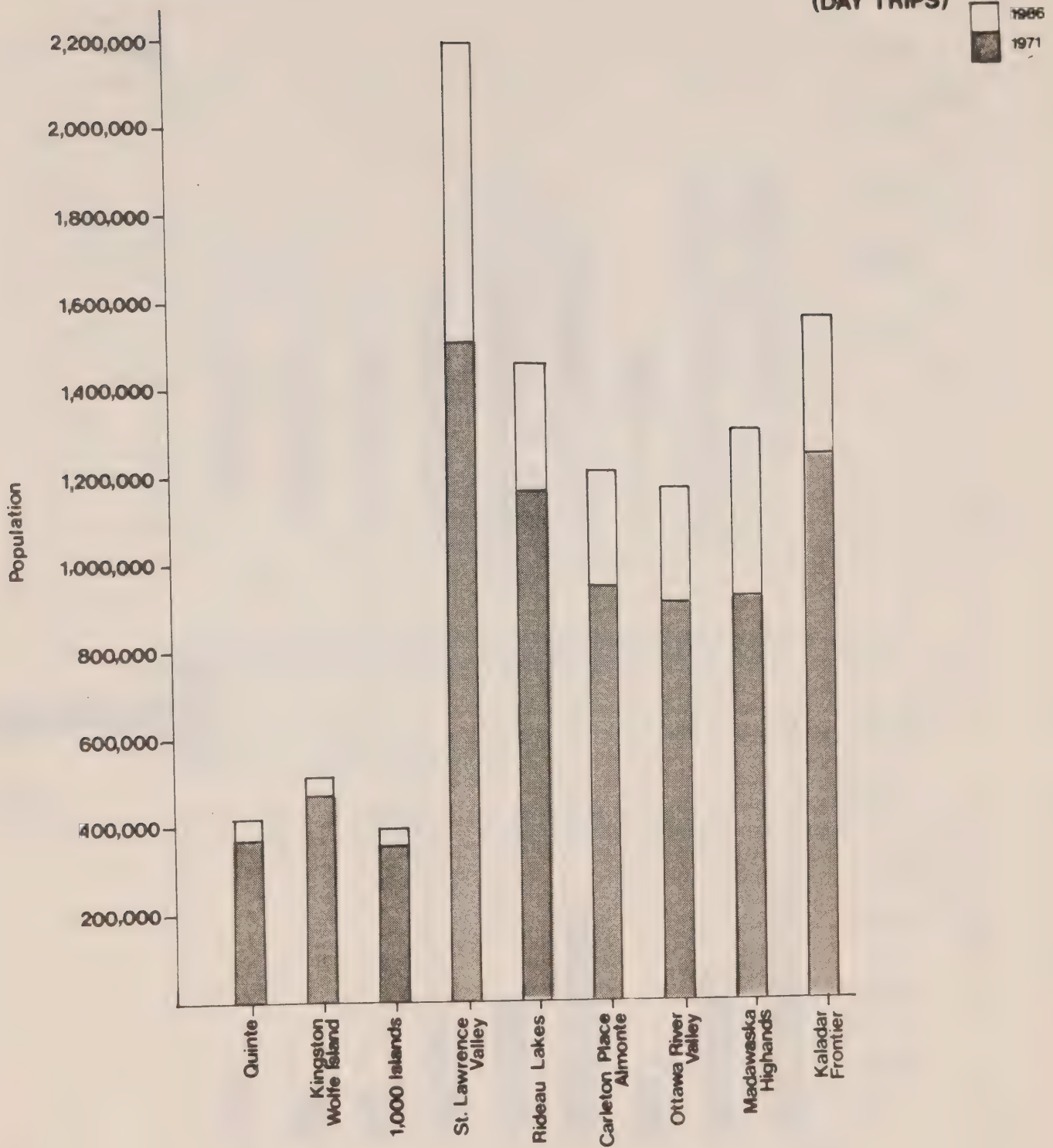
<u>Year</u>	<u>Population</u>
1971	57,847,000
1974	59,023,000
1981	62,975 000
1986	65,975 000
1991	68,972 000

c. Total Trips/Social, Recreational and other
Personal Trips to the Area

Perhaps the most significant market indicator is that pertaining to the total trips to the Zone. Within the total trips, those trips for social, recreational and other personal purposes were examined separately. Historic data is available from the Ministry of Transportation and Communications (MTC) with respect to these trips. MTC prepared trip projections which were used in this Study as another basis for examining potential market growth. Chart 2 illustrates the total trips for the base year 1974 and a projection to 1991 for each Sub-zone. It can be seen from Table 1.3 that the total trips for the nine Sub-zones over the 17-year period represents an absolute increase of 26 million trips. It also shows a percentage increase to the year 1991 of 95%, which represents an annual increase of 3.9%.

Table 1.4 indicates the social, recreational and other personal trips to both Zones along with the projections to both Zones to the year 1991. It can be seen from this Table that there is an absolute increase in numbers of 15 million trips to the year 1991, and a percentage increase of 83% which, on an annual basis, represents 3.6% per year. Chart 3 shows the social and recreational trips for each Sub-zone for the base year 1974 and projected to the year 1991. These trip projections are an important growth measure for tourism opportunities. The overall annual increase of 3.6% over a five-year period represents a cumulative growth of 21%. This increase, when applied to visitor trips and distributed amongst the various tourism facilities, such as roofed accommodation, campgrounds, marinas, etc., serves as one market basis for the major opportunities as identified in this Study. Operating costs and other factors may mean that some of the opportunities are less viable than others.

CHART 1
POPULATION WITHIN
ONE HOUR'S DRIVE
(DAY TRIPS)



Visitor Traffic

CHART 2
TOTAL TRIPS

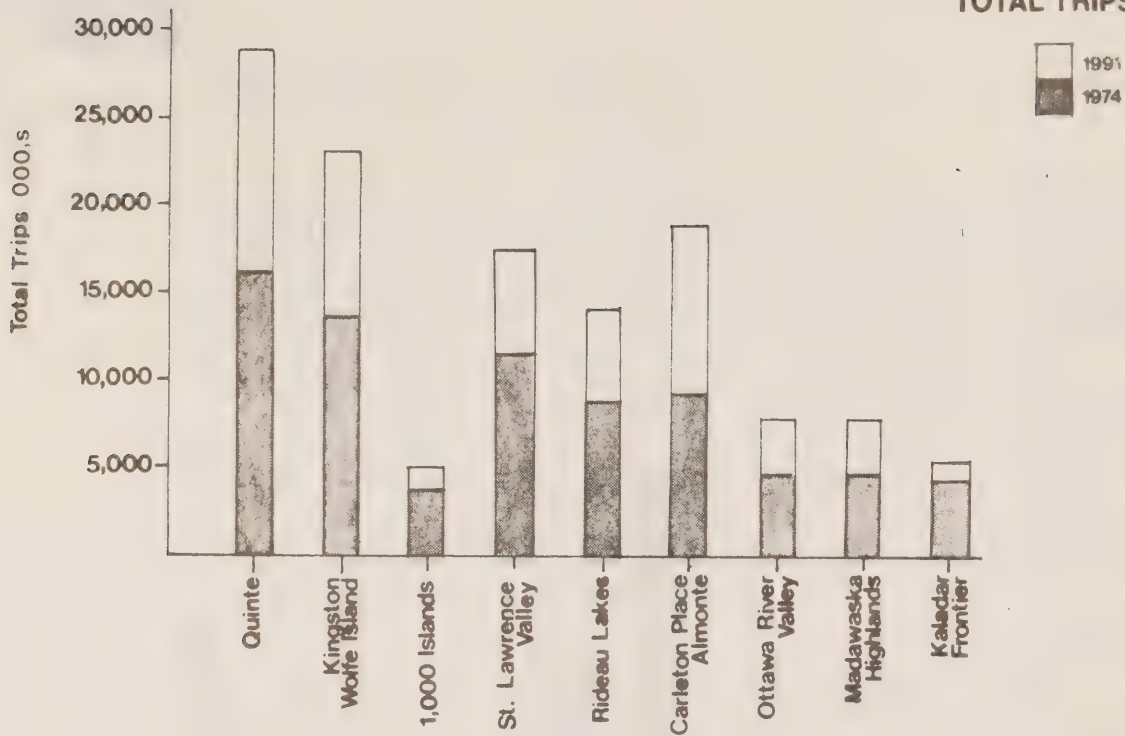


CHART 3
SOCIAL, RECREATION,
AND OTHER PERSONAL
TRIPS

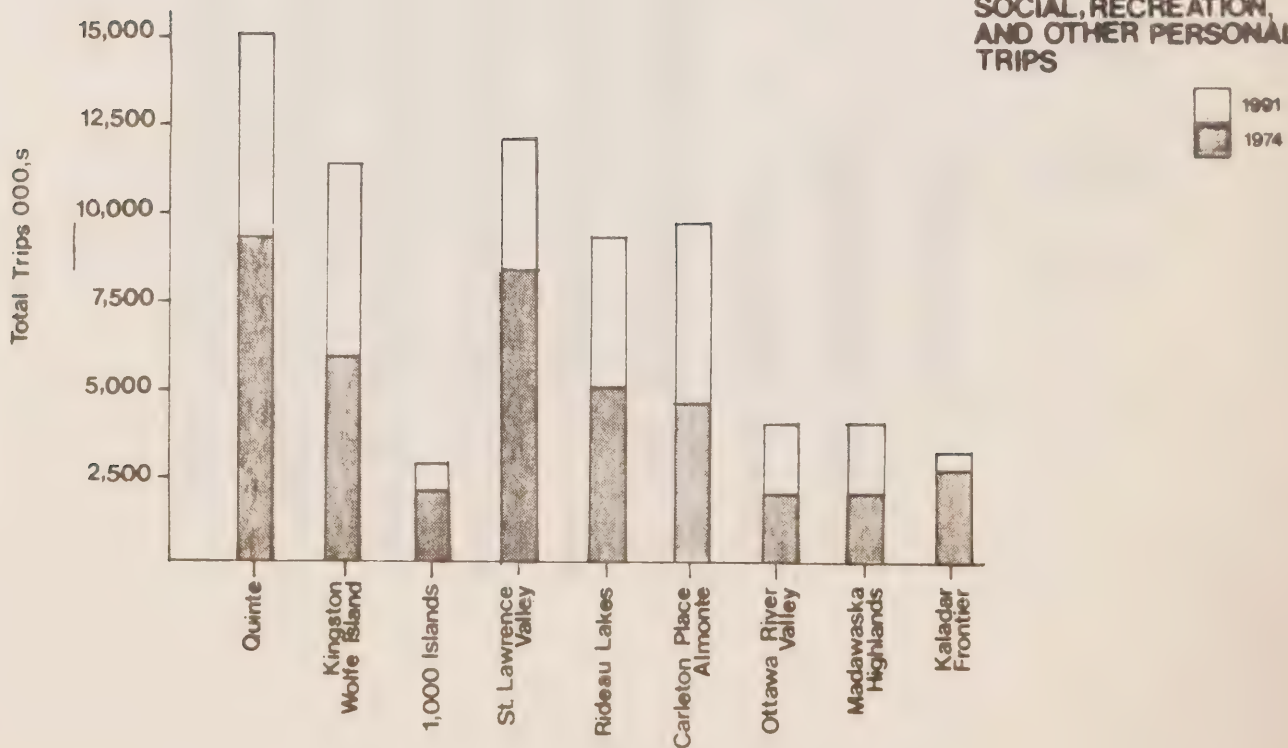


TABLE 1.3 -- TOTAL TRAVEL BY AUTOMOBILE¹

Destination	Person Trips (000's) ³		
	1974	1991	% Increase annual
<u>SUB-ZONE</u>			
Quinte	16,000	28,900	3.5
Kingston/Wolfe Island	13,300	23,100	3.3
Rideau Lakes	8,400	13,900	3.0
Carleton Place/Almonte	8,900	18,700	4.4
Ottawa River Valley/ Madawaska Highlands	4,400	7,600	3.3
Kaladar Frontier	4,000	5,500	1.8
Thousand Islands	3,500	4,900	2.0
St. Lawrence Valley	11,300	16,900	2.3
<u>ZONE</u>			
Trenton/Cornwall	23,100	38,860	3.1
Renfrew/Kingston	22,400	45,700	4.3
Total Zones ²	28,800	55,100	3.9 average

Notes:

1. Based on origin/destination studies compiled by the Ontario Ministry of Transportation and Communications up to and including 1974.
2. Because of internal trips, it is not possible to add Sub-zones or Zones to achieve total trips.
3. The numbers of person trips was obtained by multiplying the estimated annual number of vehicles by a factor of 2.35.

TABLE 1.4 -- SOCIAL, RECREATIONAL AND OTHER PERSONAL TRAVEL
BY AUTOMOBILE¹

Destination	Person Trips (000's)		
	1974	1991	% increase annual
<u>SUB-ZONE</u>			
Quinte	9,048	14,805	2.9
Kingston/Wolfe Island	6,700	11,600	3.3
Rideau Lakes	5,200	9,000	3.3
Carleton Place/Almonte	4,600	9,500	4.3
Ottawa River Valley/ Madawaska Highlands	2,200	4,000	3.6
Kaladar Frontier	2,800	3,900	2.0
Thousand Islands	2,200	3,200	2.2
St. Lawrence Valley	8,200	11,900	2.2
<u>ZONE</u>			
Trenton/Cornwall	16,000	24,400	2.5
Renfrew/Kingston	13,100	24,500	3.8
Total Both Zones ²	18,100	33,100	3.6 average

Notes:

1. Based on origin/destination studies compiled by the Ontario Ministry of Transportation and Communications up to and including 1974.
2. Because of internal trips, it is not possible to add Sub-zones or Zones to achieve total trips.
3. The number of person trips was obtained by multiplying the estimated annual number of vehicles by a factor of 2.35.

d. Tourism Expenditures

Tourism revenues in the two Zones were \$141 million (1973). Table 1.5 indicates tourism expenditures in the Zones broken down by major origin.

TABLE 1.5 -- TOURISM EXPENDITURES (1973) (000's \$)

<u>Origin</u>	<u>Trenton/Cornwall</u>	<u>Renfrew/Kingston</u>	<u>Total</u>
Ontario weekend and vacation visitor	35,734	10,905	46,639
Residents of other provinces	43,993	7,000	50,993
U.S. visitors	37,463	5,202	42,665
	<u>117,190</u>	<u>23,107</u>	<u>140,297</u>

Source: Ontario Ministry of Industry and Tourism, internal data.

e. Geographic Origin of Tourists

Table 1.6 shows the major origins of tourists visiting the Zones, and the numbers by origin.

The Ontario resident is, of course, the major component of the visitors. Also, as would be expected, the U.S. market is significant in the Trenton/Cornwall Zone.

TABLE 1.6 -- ORIGIN OF TOURISTS (1974)

	<u>Visitor Trips By Automobile</u>			
	<u>Trenton/Cornwall</u>		<u>Renfrew/Kingston</u>	
	<u>number (000's)</u>	<u>%</u>	<u>number (000's)</u>	<u>%</u>
Ottawa/Hull	1,119	7	4,487	34
Rest of Eastern Ontario	7,231	45	6,713	51
Southern Ontario	4,779	30	1,129	9
Eastern U.S.	1,424	9	321	2
Montreal	1,099	7	120	<1
Other Canadian	270	<2	221	<2
Other U.S.	93	<1	62	<1
TOTAL	<u>16,015</u>	<u>100</u>	<u>13,059</u>	<u>100</u>

f. Mode of Travel

Table 1.7 sets out the modes of travel used to visit the Zone. The car is clearly the predominant travel method but it will be noted that there is some shift in method used depending on whether the tourist is a weekend or a vacation traveller.

TABLE 1.7 -- TRANSPORTATION MODE

<u>Mode</u>	<u>Trenton/Cornwall</u>		<u>Renfrew/Kingston</u>	
	<u>Weekend Vacation</u>		<u>Weekend Vacation</u>	
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Automobile	89	85	94	75
Rail	3	5	--	3
Bus	2	3	3	9
Air	--	--	--	--
Boat	2	3	2	7
Other	4	4	1	6

g. Activities

In Table 1.8 are listed the principal activities engaged in by visitors. A breakdown between weekend, vacation, Ontario resident and U.S. visitor is given. The clear message of this table indicates the overwhelming importance of water-based activities of various kinds. This simply reflects the natural resource base throughout both the Zones.

TABLE 1.8 -- ACTIVITIES

Activity	Trenton/Cornwall		U.S.	Renfrew/Kingston		U.S.
	Ont.			Ont.		
	Weekend	Vacation		Weekend	Vacation	
	%	%		%	%	
Visiting friends and relatives	53	30	--	37	26	--
Recreational driving and touring	9	6	4	3	2	7
Cottaging	9	32	--	19	32	--
Fishing	7	4	20	11	10	20
Shopping	6	13	22	5	--	--
Camping	5	6	--	6	--	--
Motor Boating	3	4	16	7	10	19
Big Game Hunting	--	--	--	--	10	--
Swimming	--	--	18	--	--	19

h. Accommodation Used

Table 1.9A sets out the type of accommodation used by the Ontario resident/visitor. This is broken down between vacation and weekend trips. Note the consistently high proportion of travellers using either their own seasonal accommodation or visiting friends and relatives.

TABLE 1.9A -- ACCOMMODATION

<u>Ontario Resident/Visitor</u>	<u>Trenton/Cornwall</u>		<u>Renfrew/Kingston</u>	
	<u>Weekend</u>	<u>Vacation</u>	<u>Weekend</u>	<u>Vacation</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Hotel/Motel/Resort Lodge	3	1	12	8
Cottage/Chalet/Hobby Farm	42	48	15	37
Home of Friend or Relative	42	40	58	23
Tent/Trailer/Mobile Home	13	6	10	29
Other	0	5	5	3

Table 1.9B shows the type of accommodation used by visitors from the U.S.

TABLE 1.9B -- ACCOMMODATION

<u>U.S. Visitor</u>	<u>Trenton/Cornwall</u>	<u>Renfrew/Kingston</u>
	<u>%</u>	<u>%</u>
Own Cottage	24	16
Rented Cottage/Cabin	23	37
Trailer Park/Campsite	18	12
Friends/Relatives	18	19
Hotel/Motel/Resort/Lodge	11	12
Outfitter/Hostel/other	5	6

D. IMAGES AND RESOURCES

Tourism image means the visual impression or 'mind's eye' impression of the Zone or certain aspects of the Zone or Sub-zones. Theming means man's response to the Zone or Sub-zone images through the creation of features and/or use of resources. Example: if an image of Kingston can be embodied in the phrase 'Heritage City', then theming might be the architectural renovation of a heritage building for present use and enjoyment. An image may vary from person to person; however, each image is likely made up of some very similar components. The resources of the area are an integral part of the image.

Within the Eastern Ontario Zones, some very strong images exist; images that have been developed over many years. Throughout both Zones, there is one common image that links even the most diverse areas. The image is one of "Heritage" and "Waterways". The "Heritage" image is found in the architecture of the urban centres, villages and hamlets of the area and in homes and other buildings in the rural area. It is found in bridges, dams and other structures. Log homes, barns, out buildings and other log structures are not that uncommon in the area. Vestiges of a by-gone lumbering era can also be found in most locations throughout the area. Eastern Ontario's heritage has been restored on a massive scale in Upper Canada Village near Morrisburg, in Old Fort Henry at Kingston and in Fort Wellington near Prescott. Not only are the buildings themed to an earlier period, but so are costumes, implements, furniture, etc. Unlike these restorations which are primarily for tourist viewing, numerous other buildings are being used for offices, theatres, craft shops, retail outlets, factories and homes. Some, like the City Halls in Kingston and Perth, have been tastefully renovated in keeping with an earlier period but still contain all of the modern conveniences. These buildings, along with others, are a compliment to their communities and a valuable cultural resource. This precious heritage resource should not be destroyed; it must be protected. It can and should be capitalized on in the upgrading, expansion or creation of any new tourism opportunities.

The "Heritage" image cannot really be separated from the image of "Waterways" throughout both Eastern Ontario Zones. Nearly all of the urban centres, villages and hamlets of the area are situated on the great rivers found in the Zones. The St. Lawrence, the Ottawa, the Rideau, the Mississippi, the Madawaska, the Bonnechere, the Petawawa or their tributaries flow through the settlements, large or small. If the water is not moving over a twisted course, then it is found in one of the several thousand lakes of the area. Many of these are large by any standard, including Lake Ontario, the Rideau Lakes, Golden, Round, Mississippi, Bob's Charleston, Mazinaw and White to mention only a few of the larger. Except for other parts of Northwestern Ontario, the proportion of surface area covered by water is probably greater than anywhere else in the world.

The waterways, like the cultural and heritage resources of the area, are precious and must be protected. They too can and should also be capitalized on in the improvement and expansion of existing facilities and the development of new tourism opportunities. The quality of this precious resource is being seriously threatened in some locations, in others a problem is just beginning, in more remote locations the resource is still pristine but sensitive. The technology exists to ensure that new growth need not seriously affect the water quality. There also exists legal standards and the technology to remedy much of the existing problem. Action is required. New growth cannot be penalized if existing development problems are not dealt with now.

Based on our market research, the water resource is of equal significance with that of heritage for tourism development in both Zones. Water oriented activities in combination represent the greatest use of the area by tourists. Here, fishing, swimming, sailing, cruising, water touring, and cottaging are some of the more prevalent activities of tourists in the Zones.

It is not necessary to "create an image" in order to "sell" the area, which might be the case in other parts of Ontario or other provinces in Canada. The area already enjoys a market demand and therefore it is more important to capitalize on the existing Zone images in accordance with certain development principles and guidelines.* It is of equal importance to ensure that local and various provincial policies are carried out in a manner consistent with sound and sensitive development.

Within the Zones, and between the Zones, there exists considerable diversity. Out of this diversity unfolds sub-images more accurately portraying the character of the Sub-zones identified within the two larger tourism Zones. Woven in the fabric of these sub-images are the common elements of heritage and waterways. However, the sub-images are more precise or specific. They should serve as the primary guideline for development theming in specific Sub-zone locations. The sub-images are discussed here on a Sub-zone basis.

a. Quinte Sub-zone

Perhaps the most prevalent image found here is one of "spaciousness". Large open areas of water, beaches or rural landscape predominate. The scale of the resources making up this image is such that the potential or opportunities for tourism development can also be visualized on a large scale. The "spacious environment" is easily reached from Provincial Highway 401 with the entry interchanges existing at Brighton and Trenton.

* Development principles and guidelines applicable to the Zones are covered in Section IV.

Large public parks and campgrounds are found in the Sub-zone attesting in some degree to the capability of the area to accommodate significant and intensive development. A well developed road system exists in the Sub-zone and several connections are made across the Bay of Quinte to Prince Edward County, a large land area surrounded by water offering many locations for outdoor recreation activities. The image of spaciousness is enhanced by the numerous and large undeveloped areas of sand and water.

Heritage structures are common in both the rural areas and the urban centres of Belleville, Trenton, Picton and Napanee. In fact, the heritage components of this Sub-zone are as significant as any in the Eastern Ontario area. Little has been done to date to exploit the potential of these heritage resources.

b. Kingston/Wolfe Island Sub-zone

Is Kingston Ontario's "Heritage City"? maybe more appropriately Canada's "Heritage City"? Or is it Canada's "Sailing Capital"? More accurately it is probably both and a few other things as well. Here the common image of heritage and waterways is strong and ever present. Another part of the image is that of military history and pageantry, both of which could be utilized in the theming of new developments for the area. Old Fort Henry and the Royal Military College are the basis of the military and pageantry sub-images. Both are major tourist attractions. Kingston is also a city of prisons and correctional institutions, a fact that has never really been used in the tourist promotion of the area, unlike the "Rock of Alcatraz" in San Francisco Bay.

The waterway image is exceedingly strong as it pertains to Wolfe Island, access being limited to a ferryboat. It is a large pastoral area containing significant beach areas that has not been explored for its tourism potential. If this island is ever linked to the mainland by a bridge connection, it will offer one of the most promising locations in Eastern Ontario for major tourist development.

c. Thousand Islands Sub-zone

The image of this sub-zone is perhaps the strongest in the Eastern Ontario area. "Where The Way We Were...Still Is"! The impressions likely vary from visitor to visitor and to those who have yet to see the area. Few, however, will not visualize or recall rocky shorelines, blue green water and tree covered islands dominated by white pine. Cruise boats touring the island waterway is another distinct image. Likewise are Canadian and U.S. suspension bridges linking the two countries. Perhaps as important as any of these are the numerous and luxurious summer and year round residences found on the islands and mainland of the area. These are tourist attractions in themselves. Architecture of the 1920's and 30's

seems to dominate the area. These are buildings for the most part still in good repair and being used. Structures from much earlier times also are common throughout the Thousand Islands Sub-zone; many have definite potential for renovation and tourism uses.

Muskie fishing has and still does attract those anglers in pursuit of the "big one" - the river boasts the world's record muskellunge.

Large ships and pleasure yachts and smaller watercraft abound in this island waterway also adding to the visual image of the Sub-zone.

The Thousand Islands are an extremely popular tourist destination in the Eastern Ontario area. Its potential has not yet been fully realized. Innovative projects capitalizing on the resources of the area and in particular geared to the seasonal attraction of this unique waterway will have definite merit.

d. St. Lawrence Valley Sub-zone

The common zone images of heritage and waterways are the most pre-dominant images of this Sub-zone. Heritage architecture in Prescott, the Morrisburg area and Cornwall dominate these urban centres. As mentioned earlier, this is where heritage has been restored on a major scale, in Upper Canada Village and Fort Wellington. The waterway image here is exemplified by the trade and commerce aspects of shipping. Large tankers move by on the river, appearing so close you feel you can reach out and touch them. This commercial shipping element is present everywhere along the river in this Sub-zone and comes best into focus at the seaway dam and lock sites near Cornwall. The trade and commerce aspect is also quite visible on the shoreline in this area in the form of major expressways, bridge connections to the U.S. and a large industrial component.

Tourism potential in this Sub-zone rests in its close proximity to major markets. Unlike the Thousand Islands, or the Rideau Lakes area discussed later, the water resource here is not conducive to recreational pursuits. Instead commercial attractions are more likely prospects for tourism development.

e. Rideau Lakes Sub-zone

This is another Sub-zone with strongly developed images. Expansive waterways or a "Big Lakes" image exists here. The lakes are linked by the Rideau Canal system of locks. Large cruisers ply these waters in the summer, and the waters of Florida and the Bahamas in the winter. The waterway is part of the inland waterway system permitting water voyages only limited by the size of the vessel and the experience of her skipper and crew.

The rock, water and pine image present in the Thousand Islands also exists here, both being part of the Laurentian Shield. Water oriented recreational activities help reinforce the waterway image, fishing, swimming, waterskiing, boating, etc. being a few of these.

The heritage image is most pronounced in the towns, villages and hamlets along the Rideau system. Perth, Smiths Falls, Westport and Merrickville are of particular note. Rural residences also clearly depict the historic aspects of the area, as does the Canal locks system. Constructed as a defence measure in the early 1800's, it now caters to pleasure boating, the quality of which is unrivaled anywhere in North America. Again like the Thousand Islands, the cottage and seasonal resorts of the lakes are reminiscent of the 1920's and 30's, again in good repair and functioning.

The winter climate of this sub-zone does offer some potential for winter activities not often available along the St. Lawrence or Lake Ontario; however, the summer season is the Sub-zone's prime time. This season is extended, at least from the cottagers' standpoint, into spring and fall.

f. Carleton Place/Almonte Sub-zone

The image of an Eastern Ontario town is a cluster of heritage buildings rising from the banks of a river. Carleton Place and Almonte on the Mississippi River, personify this image. Nearby is the rather large Mississippi Lake, a favourite cottage area for those from Ottawa. Except for the strategic location of this Sub-zone as an eastern entry point to the Renfrew/Kingston Zone from Ottawa and Montreal, it could very well be part of the Ottawa River Valley Sub-zone. Its location will be a key asset in its potential for tourism.

g. Ottawa River Valley Sub-zone

The image in this Sub-zone is one of a past era of logging and timbering. A large number of structures exist from the "logging" or "timber" era that once totally dominated the development and economy of the area. Evidence of this can be found along the major rivers of the area and their tributaries. The industry still exists. Log booms and rafts can be seen in the Ottawa River. Saw mills and pulp and paper mills are still operating in the area. In addition, numerous heritage buildings can be found in Arnprior, Renfrew and Pembroke.

The many and great rivers of this area that once served as transportation corridors for the logging era now provide a primary source of recreation, canoeing and fishing being the most common. These waterways lace the area leaving a lasting impression on the visitor. This is the land of the Ottawa, Madawaska, Bonnechere and the Petawawa Rivers whose natural beauty remains. Except for the

settlement locations along these rivers, the water quality remains high. Nearby are large lakes and extensive forested areas where little, if any, development has taken place. Across the Ottawa lies the wilderness area of Western Quebec. The accessibility of this wilderness area from the Ottawa River Valley sub-zone is one of the prime attributes of the area.

Winter recreation is an important activity in this sub-zone and it is difficult to visualize the area without images of the white winter landscape accented by dark green conifers and the blue sky. The scene may be recalled from days spent cross country skiing, snowshoeing, snowmobiling or hiking.

Opportunities and theming in this area should relate to its "timbering" past and capitalize on its potential for access to a nearby wilderness.

h. Madawaska Highlands and Kaladar Frontier Sub-zones

The similarities in the resources of these two areas permit them to be discussed together with respect to images. The lack of physical transportation linkages between the two Sub-zones, however, requires that they be two distinct Sub-zones for the purpose of opportunity implementation. The very nature of the area precludes some of these transportation connections. A wilderness image exists but it is a "friendly" or "compatible" wilderness. The topography is not so rugged that access is a major problem in reaching portions of the area for outdoor recreation activities. In fact, one of the strongest images of this area is its many picturesque and winding roads offering numerous vistas of the countryside.

The Sub-zones offer bountiful opportunities for outdoor recreation, summer or winter; downhill and cross country skiing, snowshoeing, snowmobiling and ice fishing. Open water fishing is available from early Spring until late Fall. It is one of the few areas in Eastern Ontario offering some stream fishing for trout. Hunting, canoeing, sailing, boating, hiking, backpacking, camping are all available and always in close proximity to unspoiled rivers and lakes.

Opportunities here can best be related to the area's scenic and comfortable wilderness character and resources.

E. SUMMARY OF PERSPECTIVE

Having reviewed the resources and markets for the two Zones, it is suggested that:

1. The Renfrew/Kingston Zone be expanded to the north and west to include Pembroke and adjacent areas.
2. To the extent that various levels of government use this Study as input in their deliberations and actions, the two Zones could probably be most advantageously treated as one single entity. This should encourage consideration of the linkages and interrelationships between the less developed areas in the two Zones with the more developed areas.
3. The market projections show an expanding market for certain opportunities. The opportunities are dealt with in following sections.
4. Tourism is an important component of the economy and the estimated future growth and possible investment opportunities can have further significant impacts in the area.
5. The Zones benefit from strong existing images, including one image common to both Zones -- heritage and waterways. These images should be exploited through sympathetic theming and attention devoted to the interlinking of images and themes between the two Zones.

SECTION II -- OPPORTUNITIES

The process of identification and selection of investment opportunities in the Zone Studies utilized both a creative and entrepreneurial approach. The steps in the process were:

- an analytical review of existing facilities in the light of present and projected markets;
- discussions with present operators in the Zone;
- interviews with municipal officials and others;
- a series of brainstorming sessions with Ministry of Industry and Tourism officials;
- discussions with several potential investors in the tourism field;
- internal screening and review of ideas within the project team.

This selection process resulted in the preparation of project profiles on seven basic types of tourism operations derived from nearly 200 potential projects, themes and events. Two other opportunities, a marine touring complex and a commercial campground were also shown because of the demand figures derived from the Study. However, the returns on these two possible opportunities may be below most investors' "target" returns. The major opportunities are covered in the first part of this section; others are set out in the latter part of this section. Although those opportunities sought within the market are intended to be private development opportunities, two, 'the Destination Resort' and 'Timbertown', may require some public assistance.

A. MAJOR PROJECTS

The major project models for which profiles have been prepared are as follows:

- a. Vacation Village
- b. Destination Resort
- c. Resort Hotel
- d. Urban Hotel
- e. Heritage Inn
- f. Large Commercial Attraction (including Timbertown)
- g. Small Commercial Attraction
- h. Others
 - . Marine Touring Complex
 - . Commercial Campground

Each profile describes the concept and economic factors, including financial projections and locational considerations. Detailed project profiles appear in Appendix A.

Investment estimates are based upon averaged costs for similar facilities. These estimates are calculated on the basis of 1976 dollars. For details covering demand projections and project feasibility refer to the appendices of this report.

Rates of return are calculated on an annual basis as profit related to total investment. Profit is shown before depreciation, income taxes and interest since these three factors are dependent on individual investor circumstances and can result in significant variances in the net profit. The investment figures represent total capital value of the assets.

In the profiles which follow, the term "immediate" is used to indicate any time within the next 5 years. All other time frames are beyond this immediate period.

While each opportunity has been selected on the basis of its general suitability for the area, the present markets, trends and the basic economic viability, each individual opportunity will require further in-depth evaluation.

Project Profiles

a. Vacation Village

The market demand for seasonal recreational accommodation suggests an opportunity for a "Vacation Village". The scarcity of quality sites for cottage lots and the high land and construction costs add to the viability of the Vacation Village concept. This concept, based on U.S. experience, incorporates a mixture of privately-owned single and multiple family vacation housing, with a central lodge and/or resort hotel and common recreation and service facilities. The result is an integrated community providing quality accommodation and services with effective use of land and potential for multi-season use.

The Vacation Village should be developed in stages, based on a detailed assessment of the market. It should incorporate facilities for the public as well as owners and resort guests. For example, beach areas, campgrounds, marinas and a golf course might be open to the general public.

In examining the Vacation Village, a detailed assessment was made on a complex containing the following major components:

- a land area of approximately 2200 acres
- 4000-6000 feet of shoreline including beach
- village centre, including a resort hotel, shopping and recreation centre (indoor facilities)
- approximately 1200 housing units
- golf course (18 hole)

- equestrian centre
- marina
- skiing trails and hill, if possible
- hiking trails
- full piped municipal services for core location developments
- year round access
- availability of hydro

Investment: \$46,000,000

Return: 17-20%

Vacation Village Alternate

An alternate approach to the Vacation Village would be conceptually the same, but smaller in scale and appropriate for the Rideau Lakes area.

- land area approximately 1000 acres
- 4000 feet of shoreline including beach
- central lodge
- central recreation centre
- limited shopping facilities
- 200 housing units - initial phase
- 500 housing units - ultimate size
- full municipal services not required in first phases
- marina
- ski and hiking trails
- golf course (9 hole initial phase)

Investment: \$19,000,000

Return: 15-20%

Notes

There are economies of scale in the larger Vacation Village complex. In order to achieve the desired market price for vacation housing units on full municipal services, approximately 1200 units were estimated necessary. A first phase operation of 150-200 units with individual services may be considered acceptable. Based on the existing market demand, it was felt that 400-500 units would be the ultimate size for the Rideau Lakes Sub-zone. This may be developed on other than full services. The development period envisioned was 5-10 years depending on the scale of these projects. Ownership would likely be on a condominium basis.

Location

Within the two Zones studied, only two locations appear viable for a Vacation Village and one location for the Vacation Village alternate. It was felt that all three developments could co-exist at one time, however, there would likely be some reduction in scale of one or each opportunity. The Thousand Island Sub-zone and the Quinte Sub-zone offer the best locations for a Vacation Village. The alternate concept appears viable on a Rideau Lakes site somewhere between Jones Falls and Rideau Ferry on the larger bodies of water. The architectural rendering of the Vacation Villages or alternate should be "themed" in a manner appropriate for the Sub-zones.

b. Destination Resort

A four-season destination resort is a potential opportunity that may become feasible in the medium or long term. It may require public assistance.

The four-season aspect dictates that the location be limited to the Madawaska Highlands Sub-zone. The destination resort would be dependent upon rental accommodations with a high user volume and turnover based on a visitor stay of between 1 and 2 weeks.

Those features considered desirable in a destination resort are:

- a land area of approximately 3000 acres plus buffer zone
- a combination of hilly terrain, lakes, rivers, woodlands, etc.
- a variety of accommodation, the majority of which would be in high density clustered units totalling approximately 1000 to 1500 units
- a resort hotel and recreation centre
- a wide range of outdoor and indoor recreational activities, including:
 - downhill and cross country skiing, snowmobiling
 - boating, sailing
 - canoeing
 - fishing
 - trap and skeet shooting
 - hiking
 - tennis and horseback riding
 - golf
 - physical fitness centre
 - pool - indoor/outdoor
- quality restaurant, lounge and entertainment centre

Investment: \$35,000,000 to \$50,000,000

Return: Not assessed

Development might proceed by phases with an opportunity for a 100-150 unit resort hotel, restaurant, lounge and entertainment centre existing in the first phase requiring an investment of \$3-4 million dollars.

Location

In order to meet the four-season requirement of such project, the Madawaska Highlands Sub-zone is considered the best location.

Other Notes

A four-season destination resort is not seen to have the immediate potential of a "Vacation Village" or "Vacation Village Alternate". If a Destination Resort is to proceed within the Madawaska Highlands Sub-zone in either the short or medium term, then public sector assistance will be required.

c. Resort Hotel

The Resort Hotel could be developed independent of the Vacation Village. Present markets generally indicate an adequate supply of roofed accommodation. However, increased demand and the obsolescence of the present capacity could result in the need for new and/or renovated facilities. The market appears stronger in the Rideau Lakes Sub-zone than in the other Sub-zones. A lake front site coordinated with other tourist activities should be considered.

Some of the characteristics of a Resort Hotel are:

- year round operation
- catering to a wide range of outdoor recreation activities
- conference facilities
- 100-125 rooms
- 75-seat dining room
- 40-seat coffee shop
- 40-seat cocktail lounge
- entertainment lounge-tavern
- marina/boat dockage

Investment: \$3,600,000

Return: 10-15%

Location

The Rideau Lakes Sub-zone offers numerous potential locations along the Rideau System.

Other Notes

Present operators in the Rideau Lakes should consider a cooperative approach to constructing a new facility or expanding and improving their existing operations. Consistencies in service, architecture, pricing, etc., as well as being representative of a Rideau Lakes "image" should all be employed in such an effort.

d. Urban Hotel

Projected growth of the market indicates the need for an additional 200 hotel rooms over the next five years in the Kingston area. First class accommodation is required. In addition, there is a requirement for food, beverage and meeting facilities. A hotel facility that could meet the present and emerging needs would include:

- 200 quality rooms
- larger suites for business meetings
- 100-seat cafeteria
- 75-seat dining room
- 200-seat banquet or meeting room that can be divided into smaller rooms
- fitness and pool facilities
- parking garage and surface parking areas

Investment: \$6,750,000

Return: 10-15%

Location

The City of Kingston. A downtown core location preferably on the waterfront incorporating marina facilities should be sought. Proximity to existing or proposed office space, convention facilities, and shopping would also be preferable. Some urban hotels development is now underway in Kingston. The possibility of an urban hotel in Cornwall should also be reviewed in light of the recent downtown renovation in the City. Available market data suggests an urban hotel would be a future opportunity.

Other Notes

Two or three smaller operations of 75-100 rooms could meet the Kingston area needs; however, such operations would not offer the same potential in services or impact on the area. As envisioned here, the urban hotel should form a part of a larger complex consisting of office space, shopping and convention centre.*

* The convention centre could represent an opportunity if developed in conjunction with the hotel and other facilities by the private sector.

Architecturally such an urban hotel and/or complex should reflect the historic architecture so prevalent in Kingston. One could capitalize on the Old Fort Henry attraction in the decor of the hotel, as well as staff uniforms, etc. In addition to the fort and military motif, one reflecting sailing, boating and other water oriented activities should also be considered.

e. Heritage Inn

Within the next five years, several medium sized hotels or motor hotels are likely to be feasible in the Eastern Ontario Zones. The market requires careful assessment in light of overall market and economic conditions, as well as specific accommodation developments throughout the Zones and on the American side of the St. Lawrence River.

The type of project envisaged is a 50 room operation with excellent meeting and dining facilities. The building should be well sited, perhaps on a river, and should have a historic theme. The interior decor and furnishings might be from early settlement era to promote local history. This Heritage Inn concept has been adopted in different locations in Canada, the United States, and Europe. Within the market opportunities included here are accommodation facilities covering not only new motels or motor inns, but the rehabilitation and interior modernizing of existing inns within the Zones. Economic factors are similar to those of a small urban hotel. A typical owner-managed Heritage Inn would include:

- 50 rooms
- coffee shop/dining room
- meeting rooms
- cocktail lounge/tavern

Investment: \$1,100,000

Return: 10-15%

Location

Within the next five years, the Zones have many feasible locations for such an Inn. The Towns themselves offer the most strategic sites. Some of these sites might be the City of Belleville, the City of Kingston, the City of Brockville, the Town of Prescott, the City of Cornwall, the Towns of Renfrew and Arnprior, the City of Pembroke, plus the Towns of Perth, Almonte and Carleton Place. A specific opportunity may exist for a motor inn (budget facility) at the intersection of Highway 401 and Highway 16 just east of Prescott. Such a project would in large part depend upon the outcome of the Edwardsburgh land assembly and improved New York State highway connections to the U.S. bridge.

Nearly all the Towns and Cities mentioned have undertaken downtown or waterfront rehabilitation programs. The Heritage Inn concept would fit well into this "downtown" revitalization scheme. It should be noted that a 50 room Heritage Inn facility in Kingston would reduce the room demand of the Urban Hotel to 150 rooms.

In all cases, the theme of a Heritage Inn should relate closely to the history and folklore of the given site. These will vary from one location to another. Clustering of facilities including a Heritage Inn should be promoted.

f. Large Commercial Attractions

There are three possible opportunities for "large" commercial attractions* within the two Zones studied, the most significant of these being the Renfrew County Visitor Attraction - Timbertown which is to be located along the Ottawa River west of Arnprior towards the Town of Renfrew. This is a project that is receiving initial provincial assistance in its realization. Its theme, consistent with that of the area, will be the lumbering industry history and the related folklore of the region. This major attraction would be based on various activities among which might be included demonstrations and sale of crafts, demonstration of logging and timber activities and other activities connected with the area's early development.

Timbertown is expected to contribute to the general economic health of the area through generation of increased visits and spending.

Investment: \$8,000,000 to \$10,000,000

Return 25% (internal rate of return)

Note

This estimate is based upon work conducted for the Ministry in relation to detailed assessment of this project. The more general project profile is included in Appendix A.

* A large commercial attraction for the purposes of this Study has been set at a capital investment in excess of \$500,000.

The second opportunity, also considered viable within the next five years, would be in the vicinity of the City of Cornwall. Visitor trips and the close proximity to major markets in Quebec, Canada's capital, Ottawa, and the U.S., would support such an opportunity. A target of 200,000-300,000 visitors per year appears readily attainable for a well conceived, planned and managed operation. An animal safari or an amusement park appear appropriate to this location. A seaway location would be preferable with the attraction designed to harmonize with the surrounding area. A theme park in the form of an amusement park can be designed in such a way so as to "fit" the natural environment along the St. Lawrence river. The amusements could be related to the features of the area rather than creating a "carnival" like atmosphere. A theme park related to the technological attractions of the St. Lawrence Seaway itself should also be considered. Based on annual revenues of over \$1 million, the following investment and return figures were developed:

Investment: \$3,500,000

Return: 15-20%

More details of costs, operation and returns are covered in Appendix A of this report.

Another possibility exists on Wolfe Island near the City of Kingston. Such an attraction could relate to Old Fort Henry or the nautical elements of the setting. "Naval" military history might also be a suitable base for a commercial attraction in this area. A commercial attraction exploiting the war of 1812 - a naval engagement - has not been done. A "naval museum" 1812 vintage or a later period might have some merit on Wolfe Island. The island setting also lends itself to a "pioneer settlement" theme park project. The market for such an attraction is a future one and is directly related to the possibilities of a new bridge linking the island with the U.S. shore through Cape Vincent, New York, and connections to U.S. Interstate Highway 81, and a bridge linkage to Kingston. The plans for these transportation connections are presently being held in abeyance. A similar investment and return is expected for an attraction here as that cited for the Cornwall area.

Locations

As indicated above.

g. Small Commercial Attractions

There are relatively few small attractions in the Zones. This supply shortage, together with the present and potential volume of tourist traffic, indicates the need for more attractions.

Based on the market analysis for this Study, it appears that a better market exists for small commercial tourist attractions than for larger ones within the Zones. Rather than individual free-standing operations, a clustering of small attractions is desirable. Such clustering has merit in terms of joint promotion, shared development costs, increasing traffic flows and local economic impact. Owner-managed operations are suggested. The types of small attractions identified are:

- attractions related to local history
- children's entertainment centres - educational and amusement
- technological attractions both educational and science fiction
- sailing cruises and tour boat cruises
- law enforcement/corrections attractions
- attractions related to arts and crafts
- county wide fairs
- attractions related to wilderness adventures

Investment and Return

It is difficult to give the specifics of investment and return because of the variations in the types of attractions. A typical small commercial attraction based on a children's recreation/entertainment project including:

- the attraction
- food services
- souvenir and gift shop
- parking and site development

Would require:

Investment: \$275,000

Return: 10-15% in preferred location and lower elsewhere

Location

In the Kingston/Wolfe Island Sub-zones, the preferred locations would be near the MacDonald-Cartier Freeway (401), or near Old Fort Henry. Other locations include Smiths Falls, Perth, Merrickville, Portland, or Westport in the Rideau Lakes Sub-zone. The sailing and boat touring cruises would be related to the Rideau Lake System.

The Towns of Carleton Place and Almonte in the Sub-zone so named are also strategic locations for this opportunity. The Ottawa River Valley Sub-zone also offers suitable locations for small commercial attractions. The highest potential exists in the vicinity of Highway 17 and the new lake created by the power dam near Arnprior and near the proposed Timbertown site. In the Kaladar Frontier Sub-zone, a site near Kaladar itself would be most suitable, a wilderness connotation being the most obvious theme.

Note

Some possible themes or features by Sub-zone are as follows:

- | | |
|-----------------------------|--|
| . Quinte | Apple products; sailing; children's amusement; boating |
| . Kingston/
Wolfe Island | Sailing day cruise; police museum; children's theme park; military pageant |
| . Thousand
Islands | Boat tours; aquatic activities; glass bottomed/
glass sided boats; scuba diving; underwater park;
themed Island attraction |
| . St. Lawrence
Valley | Historic settlement; seaway development; Indian
heritage |
| . Rideau Lakes | Boat cruise; aquatic activities |
| . Carleton
Place/Almonte | History; family amusement park; Mississippi River
aquatic activities |
| . Ottawa River
Valley | Local history; timber action park; wood crafts |
| . Kaladar
Frontier | Children's wilderness action park |

These small commercial attractions offer investment opportunities for operators in the Zones through a cooperative effort, such as actually incorporating a company to undertake the project. Present owners of accommodation and restaurant facilities would be well advised to consider a small commercial attraction in close proximity to their present facilities. More details of the small commercial attractions are offered under Appendix A of this report.

h. Others

Under this heading, we have included a Marine Touring complex and a Commercial Campground. These opportunities have been set aside either because of the uncertainty regarding returns or the limited returns projected. There is, however, value in discussing them. Firstly, they all have merit as part of other identified development opportunities, i.e., urban hotel, vacation village, etc., and secondly, the demand for such facilities is likely to increase in the future.

. Marina/Marine Touring Complex

The economics of private marinas are frequently marginal. The complications inherent in receiving the necessary approvals in construction of a marina also act as a deterrent to the private investor. This is an area where government financial and administrative assistance is required in order to reduce costs, increase revenues and more importantly, to ensure that the necessary facilities are constructed.

Characteristics of a typical marina have been set out below:

- 100 slips
- 163 days operation/year
- revenue sources including:
 - . repair service and maintenance
 - . fuel, berths and moorings, etc.
 - . new and used equipment, clothes, motor supplies, etc.

Investment: \$350,000 (assumes minimal site improvement)

Return: 5-10%

Location

It is envisaged that with increased boat ownership, touring, similar to automobile touring, will become a significant activity. Thus future locations should relate to average daily tour distance. The three most promising locations for a marine touring complex within the Trenton/Cornwall Zone are in the Quinte Sub-zone, Kingston/Wolfe Island and the St. Lawrence Valley Sub-zones (some at a later date). There have been proposals prepared for a number of marinas as components in waterfront redevelopment for villages, towns and cities along the major waterways. These should be promoted particularly if they form part of a total development package providing accommodation, food and social/cultural facilities for both tourists and residents. The objective in such developments should be a mixture of facilities and the creation of a vital active complex. Within the Renfrew/Kingston Zone, there are no immediate opportunities for a marina or marine touring complex. After 5 years, the Rideau Lakes and Ottawa River Valley Sub-zones should be reassessed.

. Campgrounds

The present market demand is not sufficient to warrant the construction of new campground facilities in either Zone. The longer term situation may be brighter depending largely on the extent of government involvement in this industry. Private operations now face some competition from government in this aspect of the tourist industry.

For the purpose of this Study, a typical 85-site campground facility has been assessed having the following characteristics:

- central services building
- laundry
- grocery store
- recreation room
- swimming pool
- utilities and hook ups
- sewage treatment and landscaping
- vending machines and other services

Investment: \$160,000

Return: 5-10%

B. SMALLER PROJECT OPPORTUNITIES

Some other project possibilities are set out here in a general manner for consideration for investors within and outside the Zones. Some may be of particular interest to existing operators, as a new venture or as an expansion to an existing one that may increase their revenues. Project profiles were not prepared for these possible projects, they would, however, fit the strong images of the Zone. Obviously some of these projects are not suitable for private investment only. Some would be community supported projects, while others might merit support by the local tourism industry. In any case, it was considered worth setting them out for further exploration by those interested. For purposes of clarity, these projects have been listed on a Sub-zone basis.

a. Quinte Sub-zone

- a. Boat and Car Racing: Hydrofoil or sailboat races should be considered for the Bay of Quinte area. Joint sponsorship of such a project could increase tourist volumes to the area significantly. Likewise car races, either grand prix style or sports car rallies could be attractions drawing a substantial number of visitors from many miles to the area.
- b. Air Museum: An air museum at or near Trenton might have some merit. It is the kind of a project that local operators could easily sponsor. Assistance might be available from the Federal Department of Transport.
- c. Cheese Attraction: The Black Diamond operation might be approached with respect to a small commercial attraction featuring cheese making. Local operators could also get behind such a project.

- d. Transportation Theme Park: Such a theme park might be considered in the Napanee area. An exhibit of energy alternatives might be a feature of such a park. The probable scale of this project may require substantial public financial assistance. Present market population in easy reach of such a theme park does not warrant such a venture in the immediate future unless there was some government assistance available.
- e. Summer Theatre: The setting and the seasonal market could make this a significant attraction in the area. A high quality facility could gain a wide reputation and draw visitors from a considerable distance. The merits of such a project should be explored further by operators, financial groups and community leaders.

b. Kingston/Wolfe Island Sub-zone

- a. Marine Touring/Maritime History Project: The idea of a maritime theme park or museum has been mentioned earlier. Another variation on the theme might be a marine "tour under canvas" that takes one past the hulls of anchored heritage ships with opportunities to board such vessels. Such a project could be tied in with a larger commercial attraction such as Old Fort Henry or future maritime attractions on Wolfe Island. It could also operate as an independent attraction. Like many other projects, it is the kind of venture that existing operators could undertake on a joint basis.
- b. A Sailing School: A school that might achieve national or even international recognition for both novices and experts could be a real possibility in Kingston, Canadian sailing capital and site of the 1976 Sailing Olympics. Whether such a project is feasible from a private development standpoint is not known. Such a facility might be part of a larger complex including a marina, Urban Theme Park (Heritage), or even a cultural complex. It seems a worthwhile project for local business and community support.
- c. Theatre/Music/Art Centre: The number of successful events held during the 1976 Olympic season would indicate there is a strong desire for a cultural facility within the City of Kingston and its environs. A project of this nature will likely be communal, but local business and financial support is required. Grants and subsidy programs should also be investigated. The tourist operators in the area could take the lead on soliciting support for such a project.
- d. Criminology Centre/Museum: The penitentiary system existing in Kingston could serve as the base for such a facility. It could either be a private or public facility. If appropriately developed, it would likely draw a considerable number of visitors. This type of attraction, based on the large traffic volumes in the Kingston/Wolfe Island Sub-zone could be quite successful. It offers the opportunity of a cooperative effort on the part of present operators in the area.

- e. Waterfowl Sanctuary: The environs of Wolfe Island present an ideal location for a waterfowl sanctuary. On a large enough scale and properly managed, such a sanctuary could provide a tourist attraction in spring and fall when the tourism traffic is usually off. It could also provide improved opportunities for sport shooting in adjacent areas. Duck and geese hunters in sufficient numbers can have a solid and positive impact on a small community. This project would develop with the Ministry of Natural Resources participation and perhaps that of the Federal Government.

c. Thousand Islands Sub-zone

- a. Underwater Park: Several existing operators mentioned this project as a possibility for development within the Thousand Islands. In addition to using glass bottom boats for tourists in such a park, scuba diving would be a major activity. The idea requires a controlled environment of a sufficient area to encompass all the exhibits plus the need to ensure water clarity. Technically, the clarity problem is considered solvable. An attraction of this kind would be of particular benefit to cruise boat operators in the area. Their joint collaboration on such a scheme might be warranted.
- b. Mini Ontario/Mini Canada Attraction: If properly executed, this attraction would be of special interest to U.S. and other foreign visitors. The idea is based in the use of a reasonably large tract of land and creating through landscape and man made features a miniature Ontario and Canada. A water orientation would be necessary for the Maritime and British Columbia portions of such a "scaled down" model. It cannot be ascertained whether such a project would draw sufficient visitors to make it economically feasible. Certainly the traffic volumes in the area would warrant it. Features of this kind can have a positive effect on the whole of the tourist business in an area.
- c. Waterfowl Sanctuary: See Kingston/Wolfe Island; the same project would have merit here.
- d. Boldt Castle Development: It appears that this uncompleted mansion and major tourist attraction in the area (Heart Island, U.S.A.) will be renovated by the Thousand Island Bridge Authority. Participation in the project by Canadian operators would be worthwhile and perhaps prudent. U.S. participation in Canadian projects might be sought someday. It might also be possible to get some Canadian exhibits in the refurnished castle.

d. St. Lawrence Valley

- a. Boat Racing: River conditions between Brockville and Prescott or Morrisburg are such that boat racing, either power or sail, could serve as an attraction to the area. In addition to local community sponsorship, business sponsorship of such events would be important. A collaborative effort between Canadian sponsors and those now sponsoring such an event out of Ogdensburg, N.Y., might be worth investigating.
- b. Heritage Project/Military or Other: The quality and quantity of heritage resources, primarily in existing functioning buildings in the Prescott area could be capitalized upon. If tastefully done and linked to existing attractions like Fort Wellington, such a project could have a significant impact on the economy of Prescott and environs. The Prescott waterfront reconstruction appropriately themed and developed could be a first step in this direction. One suggestion has been a Williamsburg (Virginia) type of attraction and encouraging participation for those visiting the attraction.
- c. Summer Theatre: See the project suggested for the Quinte Sub-zone; a similar project definitely has merit here, especially in light of its proximity to major markets and its accessibility to the Thousand Island and Rideau Lakes are already attracting large numbers of summer visitors and residents.
- d. Dairy or Cheese Attraction: In this case a project similar to that outlined for the Quinte area but oriented to Balderson cheese might have merit. The dairy industry must be contacted on this project; local tourist operators could take the initiative.
- e. Apple Attraction: The historic MacIntosh apple could be featured in such a project. The components here would be quite similar to those encompassed in a Dairy Attraction, in fact a combination of the two in the area would have definite merit. Local tourist operators should unite, at least in an investigatory sense behind these two possible projects.
- f. St. Lawrence Seaway Exploitation: This area, oriented primarily to Cornwall should be examined on a micro opportunity basis. Viewing towers, foot bridges across the St. Lawrence River, boat tours along the seaway, a marine museum or complex are but a few of the suggestions heard from this area. Utilization of the "seaway" attraction would add considerably to tourist revenues in the area; it would mean longer stays by tourists which is definitely needed. The possibility of a seaway attraction should be examined for linkages to a major commercial attraction in the area which has been identified earlier in this section.

e. Rideau Lakes

- a. Marine Touring: While this report was being prepared, entrepreneurs had already capitalized on the potential for boat cruises on the Rideau Lake system. It is too early to tell whether such ventures will be successful but cooperation by resort owners in the area would be well advised both from their standpoint as well as that of the tour operators. Both these ventures are extremely compatible and through pre-arrangements, both parties should gain.
- b. Heritage Project: See St. Lawrence Valley for a similar opportunity cited for Prescott. In the Rideau Lakes Sub-zone, the best opportunities for a similar project are in Perth, Smiths Falls and Merrickville. Individual or cooperative efforts would have merit in these municipalities. Here, as in Prescott, attempts towards restoration are best undertaken in conjunction with some commercial attractions.
- c. Crafts Centre: An opportunity may exist in the vicinity of Elgin for a craft centre perhaps in combination with a special crafts school. Proximity to seasonal tourist accommodation plus the Ottawa market might make such an endeavour reasonably successful. Like all such projects, quality would be essential; name artists or craftsmen acting as instructors with adequate facilities would almost be essential. Urban residents or those on vacation in the area might partake of such an opportunity. Commercially, if properly marketed, a craft centre could also prove profitable. Those in the area interested in such a venture should examine similar operations in other parts of Ontario and the U.S.

f. Carleton Place/Almonte

- a. Heritage Project: See St. Lawrence Sub-zone for a similar opportunity cited for Prescott. Both Carleton Place and Almonte have the heritage resources to capitalize on such a project. In addition to a Heritage Inn already mentioned earlier in this section, other renovations might include a museum, art gallery, restaurant, theatre or cultural centre. Theming such a project with the pioneer settlement aspects of these municipalities would be most appropriate.

g. Ottawa River Valley, Madawaska Highlands and the Kaladar Frontier

- a. White Water Canoeing: The similarities in these Sub-zones are such that their resource base, primarily natural, could accommodate similar types of opportunities. One of these is white water canoeing. Expanding the zone to include Pembroke and areas beyond, opens up an almost unlimited opportunity for the outdoor experience. Areas in Western Quebec are also available from this location. Some of

the rivers include the Black, Coulonge, Petawawa, Madawaska, Bonnechere and the Ottawa. There presently exists a "white water rafting" operation on the Ottawa River. A commercial operation might be viable if strategically located and offering several trips. Such a commercial venture would likely be even more successful if it was linked to a resort complex within these Sub-zones or to the more intensive developments to the south.

- b. A Wilderness School Camp: The natural resource base of the area offers potential for a wilderness school camp offering a wide variety of activities. Downhill and cross country skiing, snowshoeing, snowmobiling, ice boating and ice fishing are some of the winter activities possible. Fishing, fishing instruction, hunting, swimming, biking, crafts, survival training, canoeing, boating and sailing, could all be offered throughout the summer. The proximity to the Ottawa and Toronto markets is such that sufficient numbers might enroll to make it a profitable venture. Such a wilderness school camp might also be linked to a Vacation Village in another Sub-zone serving as an outcamp. It might also be a part of a university. An expanded facility could offer fly-in trips to even more remote wilderness areas in Ontario and Quebec. It, like many of the other possible projects in this section, could be undertaken on a collaborative basis by operators in the area.
- c. Outfitters Camp: The Pembroke area would appear to offer some opportunity for such a facility. Fly-in trips to remote locations in both Ontario and Quebec are quite reasonable from this location.
- d. Heritage Projects: The Towns of Arnprior, Renfrew and Pembroke have or are now considering downtown rehabilitation projects. Detailed plans have been prepared for some of these locations and implementation is underway in others. Successful projects of this kind have not only increased downtown retail sales; they have had a beneficial effect to the whole of the community increasing the number of visitors to the area and stabilizing the tax base of the municipality. Local merchants, civic leaders and tourist operators, amongst others, should attempt to see such projects commenced and carried through to completion.
- e. Auto Touring Routes: This is the kind of project local operators can easily develop, sponsor and promote which will in turn have beneficial effects on their operations. The many small towns, villages and hamlets linked by scenic roads in the area offer a perfect opportunity as do readily available maps clearly showing points of interest with descriptive material covering aspects of culture, history and resources. Some detailed studies have already been undertaken for parts of Renfrew and Lanark County covering auto touring routes. These volumes should be "dusted off" and re-examined by those in the tourist industry, the business community and in public office. These are relatively simple projects that would have direct benefit to the area if implemented.

C. PHASING

In identifying the opportunities, emphasis has been placed on those that appear more immediate. Although certain opportunities are classed as "immediate", actual development cannot be assumed because other factors such as environmental controls and related costs cannot be accurately ascertained. Some opportunities may proceed in the first year, others in later years. It is not likely that the total capital costs for the opportunity will be expended in five or even ten years. A Vacation Village complex for instance, might evolve on the basis of 150-200 units per year. This means it could take nearly ten years to develop the Village with capital costs spread out over that time frame.

The immediate opportunities do not mean that there is a corresponding immediate priority for development in either the public or private sector. There has been no attempt to establish priorities amongst the various immediate opportunities identified. A multitude of factors will affect the private sectors' selection and development of the opportunities so that priorities are not really meaningful within the context of this report. Table 2-1 lists opportunities by Sub-zone and indicates whether the opportunity is immediate, i.e., five years or less, or longer than five years.

TABLE 2-1 OPPORTUNITY PHASING

	Vacation Village	Destination Resort	Urban Hotel	Resort Hotel	Heritage Inn	Large Commercial Attraction	Small Commercial Attraction	Marine Touring Complex	Commercial Campground
Quinte	*				F		*	* ²	F
Kingston/Wolfe Island			*		*	F	*	* ²	
Thousand Islands	*						*	* ²	F
St. Lawrence Valley			F		F	*	*	F	
Rideau Lakes	*			*	F		*	F	F
Carleton Place/Almonte					*		*		
Ottawa River Valley						*1	*	F	F
Madawaska Highlands		*							F
Kaladar Frontier							*		F

* Immediate

F Future

1. Timbertown

2. Although there is an immediate demand for these facilities, the returns are shown to be marginal. See Appendix A.

SECTION III - DEVELOPMENT GOALS AND OBJECTIVES

A. GOALS

The two basic Provincial goals for tourism development of the Ministry of Industry and Tourism are:

1. To increase tourism revenues, and
2. To increase tourism employment.

The question is: Can these goals be achieved within the area recognizing its assets and liabilities, be they natural or man made, the economic market situation and Government policies? The answer, based on the findings of this Study, is: 'MAYBE YES'.

In order to better evaluate the area in light of these goals, the goals were set out individually alongside a listing of constraints. Commentary was then developed on a Zone basis embodying the findings of this Study, then conclusions or answers were drawn, either YES, NO, or MAYBE.

The two basic goals are assumed to include such Sub-goals as:

- increasing year-round usage;
- increasing per capita expenditures;
- increasing the length of stay.

Constraints

The constraints were broken down into three categories and several sub-sections, being:

1. a. Natural Environment/Resources

Scenic value, variety, quality of resource, uniqueness.

- b. Man-Made Features

Extent of Development - Urban, Suburban, Seasonal, Rural, etc. Accessibility - roads, bridges, tunnels, water transportation, etc. Development problems - communication linkages, availability of services, i.e., sewer, water, hydro, telephone, etc.

2. Economic Market Factors

Past growth rates, projected growth rates, present supply and demand and projected demand.

3. Government Policy

Development control policy as reflected or regulated through the Ministry of the Environment, the Ministry of Natural Resources or the Ministry of Housing and other agencies.

The Zones were then evaluated for their ability to achieve each goal in light of the knowledge obtained about each constraint through the Study. The approach was not intended to be definitive or scientific. Instead, it was used to get a general assessment of the Zone's attributes and deficiencies. Instead of using a matrix or table, simple commentary has been given for each Zone.

a. TRENTON/CORNWALL ZONE

a. Natural Environment/Resources

Considerable variety exists within the Zone in the type and quality of the natural environment and resources of the area. Water quality problems exist in a number of locations throughout the Zone. These are most pronounced in the Cornwall area. Less serious water quality problems also exist in the Kingston to Thousand Islands area. Environmental quality seems to be better in the Quinte Sub-zone, both land and water. Major new development in this Zone will likely require full municipal services and other stringent environmental controls. The technology exists to provide such controls; however, more specific standards need to be developed.

b. Man-Made Features

The existing infrastructure in the area could support more development. The facilities are good, servicing exists in several locations and access is excellent to the area. Urban, suburban and other development has not been so excessive as to cause serious problems. Some note of caution should be raised regarding uncontrolled cottage development.

c. Economic/Market Factors

Here, all signs appear positive. The volume of tourist traffic to the area is significant and increasing. The proximity to markets is good and the market population is increasing. The area's potential for tourist expansion and new development from those economic factors examined, appears good. The Zone has an established image, plus images exist on a Sub-zone basis that will be instrumental in attracting new tourist trade.

d. Government Policy

Present government policy should not prove a deterrent to sound tourism development of the Zone. Strong environmental regulations will have to be adhered to but this should not deter properly planned and implemented major project development. More specific criteria and standards however will be required if the private sector is to proceed with assurance of just what is expected of them.

e. Summing Up

It was concluded that from the standpoint of achieving the goals, the Trenton/Cornwall Zone would rate a 'YES', depending on the environmental protection measures required and instituted. Some local areas will have more difficulty than others with the elements of diversity and quality because of cost disadvantages with competition across the border in the U.S. The economics of larger scale projects may offset this disadvantage and the tourist volume and growth factors would appear to warrant such projects.

b. RENFREW/KINGSTON ZONE

This Zone has more diversity in its natural environment, man-made facilities and proximity to markets than the Trenton/Cornwall Zone. It is, therefore, more difficult to generalize about this zone and the effect of the various constraints on development.

a. Natural Environment/Resources

In the northern and western portions of the Zone, the quality of the environment and the quality and abundance of resources is high. For the most part, this area has received little, if any, development pressure. In the Rideau Lakes area and in the vicinity of Kingston, environmental concerns are more pronounced. Environmental protection will be a more serious problem in the central and southern portions of the Zone.

b. Man-Made Features

In much of the Zone the man-made developments are quite limited and their lack does adversely affect the development potential of the area. In some locations access is a problem, new bridges are required, and services are not available. The lack of this infrastructure may also be considered an asset for certain types of tourism use, especially when the area is relatively close to major markets. In the southern portion of the Zone, i.e., near Kingston, the man-made features do exist permitting more intensive development, subject to environmental controls.

c. Economic/Market Factors

The east-central and southern portions of the zone are much closer to existing and future markets. Traffic volumes are high, and increased growth is expected. The demands for tourism facilities, especially accommodation and water-related activities, will increase. Demand will also likely increase for those activities associated with the natural environment in the western and northern portions of the Zone. If properly balanced, both portions of the Zone could benefit from increased demand in this area.

d. Government Policy

Environmental protection legislation and regulations could prove a deterrent to growth in the Rideau Lakes area. Here again, economics of scale may permit development that will have little, if any detrimental impact on the natural environment. More specific criteria and standards are required for the Rideau Lakes area as they pertain to environmental protection. Development in areas further north and west, where less pressure now exists for development, should not be adversely affected by government environmental policy. In the Ottawa Valley, where full services exist, development constraints should be minimal. The Ottawa River, because of its large flow volumes, may also be capable of more substantial development.

e. Summing Up

Increased revenues will likely be a problem in the northern and western portions of the Zone because of economics and market constraints. In the east-central and southern portion of the zone, the effect of these constraints will be minimal. Overall increased revenues are judged to be: MAYBE; certain portions of the Zone increasing, others likely remaining the same. Some local problems may be created by increased volumes.

There are opportunities for diversity in this zone if investors and existing operators can capitalize on them. One could offer 'posh' resort accommodation with easy 'fly-in trips' for hunting, fishing, winter sports, and white water canoeing. Quality can and needs to be improved in much of the Zone. Visitor volumes would appear to warrant quality accommodation plus quality cuisine in a natural setting, especially in the south and central part of the Zone. Existing or anticipated constraints affecting the Zone should not have serious detrimental effect on achieving increased results or increased employment. Overall, the Zone should be rated: YES, on its ability to achieve the goals within the constraints affecting the area.

B. OBJECTIVES

Some of the objectives which have merit in relationship to the goals set out earlier in this section are:

1. To develop tourism projects that relate to and capitalize on the features of the Zone, reflect market demand, and which can be implemented within sound environmental principles.
2. To develop new tourism and recreation opportunities on a scale to be competitive with operations elsewhere.
3. To improve the quality of all existing facilities in order to increase repeat visits and tourist volumes.
4. To promote the Zones in a comprehensive and vigorous manner consistent with those features of the Zones.
5. To encourage expansion and improvement of existing operations consistent with the market demands for various opportunities within the Zone.
6. To seek community and provincial endorsement and support for those development projects that are consistent with the basic goals within a framework of sound environmental planning.

Those responsible for the fulfilment of these goals should include as wide a spectrum of interest as possible from existing tourist operators to public officials at all levels of government.

SECTION IV -- DEVELOPMENT PRINCIPLES, GUIDELINES & THEMING

In the preceding sections, the Zone Studies were introduced and a perspective on each Zone and Sub-zone was given. The result of the supply and demand analysis was also given for each Zone. The images and resources of the Zones and Sub-zones were examined, goals and objectives set forth and various development opportunities identified. In this section and the following section, emphasis will focus on what should and can be done to bring about the realization of the identified opportunities and some approaches to improving volumes, diversity and quality of tourism in the Eastern Ontario Zones.

A PRINCIPLES

Various studies undertaken for the Ministry of Industry and Tourism have established several principles for the development of tourism facilities in the province. The adoption of these principles is desirable for the most effective use of tourism resources, better promotion of tourism facilities, the protection of natural resources and the conservation of those elements comprising the environment. These principles are considered applicable to the Eastern Ontario Tourism Zones and consistent with sound planning and development principles supported by various provincial ministries. They are:

1. Attractions should be clustered at focal points where the highest recreation activity either exists or where there is potential for such activity, thus strengthening any existing focal points or creating new ones. This clustering should lead to more efficient use of existing or new public services.
2. The focal points should have reasonable access to a major transportation corridor. The corridors also should connect the Zones to promote efficient transport of people into and through the tourism Zones as well as access to the facilities and to border entry points.
3. Recreation roads within the Zones should provide access to the clustered attractions and link focal points throughout the Zone.
4. Recreation roads should enhance the travel experience, consisting of aesthetic views and vistas from the road as well as conveniently connecting population centres.
5. A comprehensive and integrated marketing strategy should direct the tourist to the focal points and/or attraction clusters.

6. The quality of attractions, food, accommodation and other facilities must be high at all focal points. Using recreational roads, the tourist must be able to count on quality.
7. An entrance point is an area at the intersection of a corridor and a recreation road providing an important major access point to the Zone. They should provide services to the travelling public and introduce the public to the Zone's attractions.

Some of these principles are illustrated rather simply in Figure 1.

In order to indicate how the principles set out here are being followed, a general development scheme for the Eastern Ontario Zones has been prepared and is shown in Figure 2. This plan may be useful in assisting potential developer/investors to locate the identified opportunities and visualize the interrelationships between access, Sub-zone linkages, as well as the relationships between the two Zones studied. It may also be useful to local and provincial officials interested in tourism planning and development.

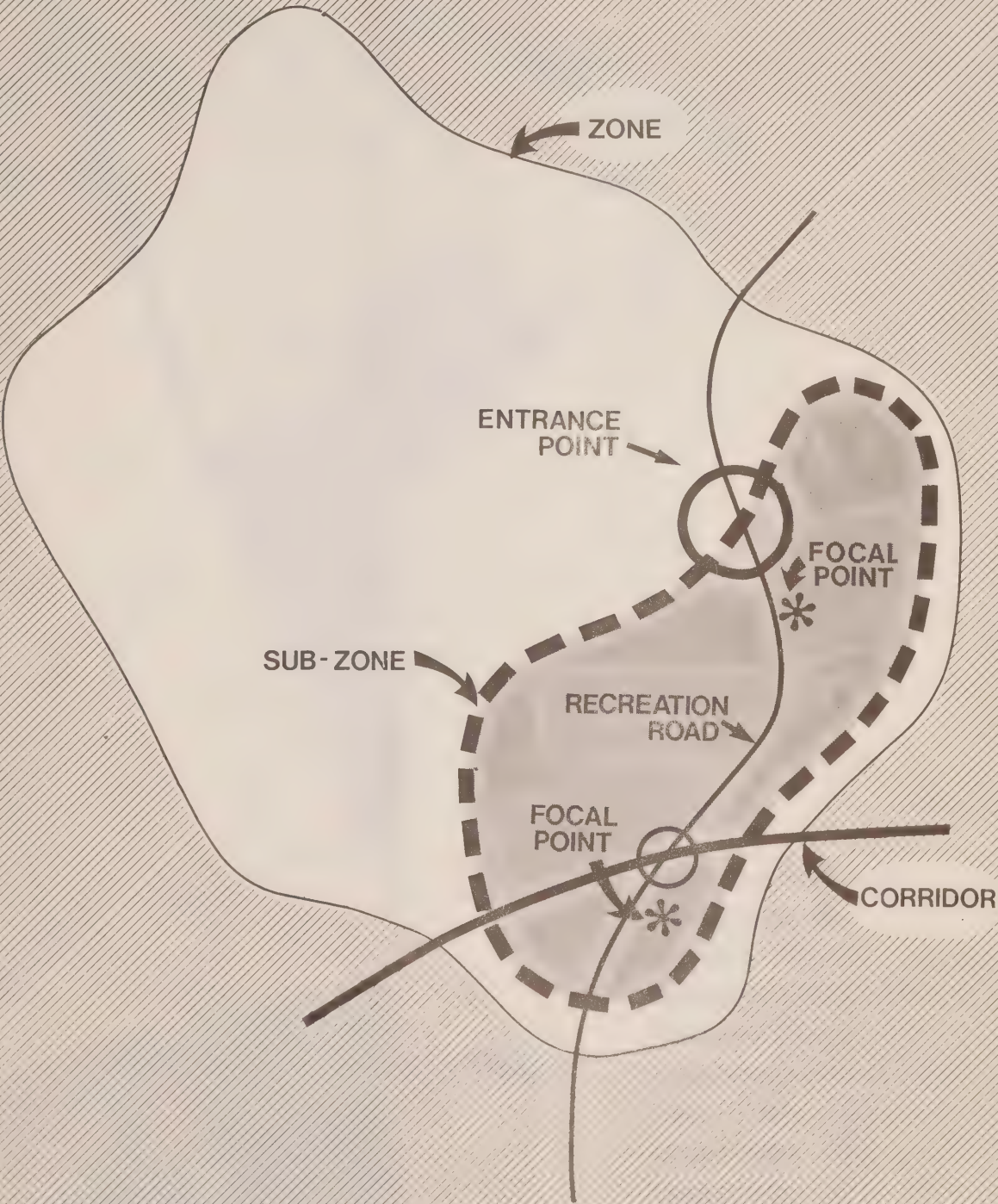
B DEVELOPMENT GUIDELINES AND THEMING

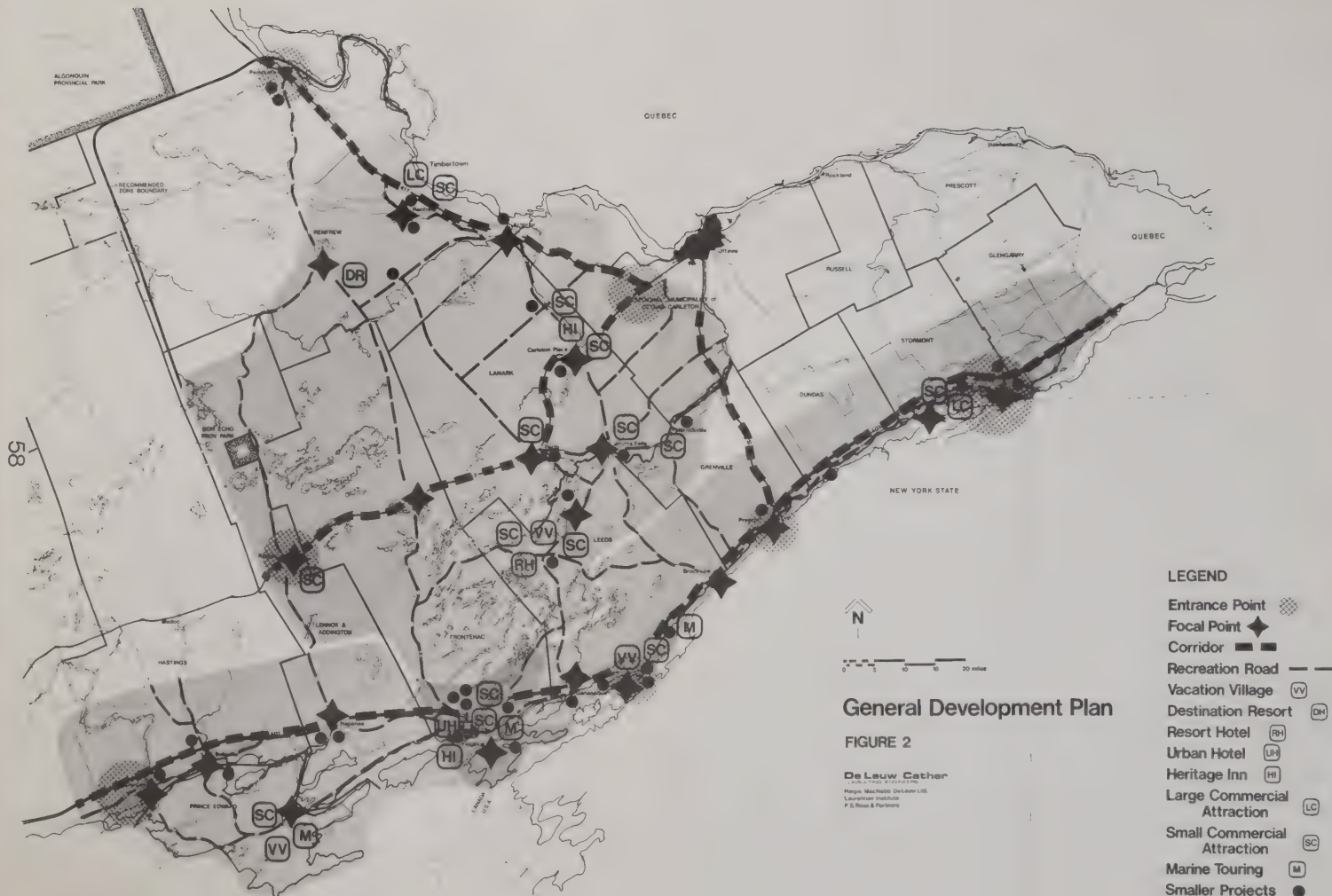
Guidelines and theming set out here have been directed primarily to the identified opportunities. They should also be of value and have application to improvements in existing facilities or the expansion of existing facilities.

a. General Theming

The most important development guideline is to have appropriate theming. Proper theming will build on the strong images of the Zone and set the proper and expected impression for the tourist. It will add interest for the tourist and create an atmosphere of acceptance or belonging not achieved with poorly themed developments.

Appropriate theming is not an individual exercise applied on a hit or miss basis throughout the Zones. Instead it should be reflected in a comprehensive manner within urban centres, rural areas and even in the more remote locations of the Zone. It is particularly important that such development theming be an integral part of the planning and development process in communities of





Eastern Ontario. Site Plan approval provisions under the Provincial Planning Act may be used to achieve some degree of theming. Design review committees may also be established in communities to review and recommend development submissions to Council or Planning Board. Designating certain areas within the community for a design control within neighbourhood or secondary plans, would serve as the basis for a "design" committee to function.

The image most important in the Eastern Ontario Tourism Zones requiring appropriate theming is that of "heritage". It is a reasonably simple image to theme through observation and duplication. It is much more difficult to achieve using more modern materials and keeping within the constraints of budget. Attempting to duplicate the limestone structures present throughout the Zones would be prohibitive from a cost standpoint. However, the use of modern materials and an innovative approach, appropriate theming can be achieved. The use of masonry and wood in forms capturing arches, earlier window spacing and more formal space arrangements seems appropriate. An architectural treatment capturing earlier architectural details would also help. Building siting and landscape architectural treatment can also add to the image of heritage.

Existing heritage structures should be renovated in close keeping to the original architectural treatment in all respects with the exception of interior spaces and conveniences. Expansions to existing heritage structures should follow the same guidelines. Remodelling existing non-heritage structures should attempt to use the architectural details and materials of an earlier period. In remote or wilderness areas, a rustic treatment can easily be achieved with modern materials. There are, for example, many predesigned and precut log structures that would be most suitable for such an environment.

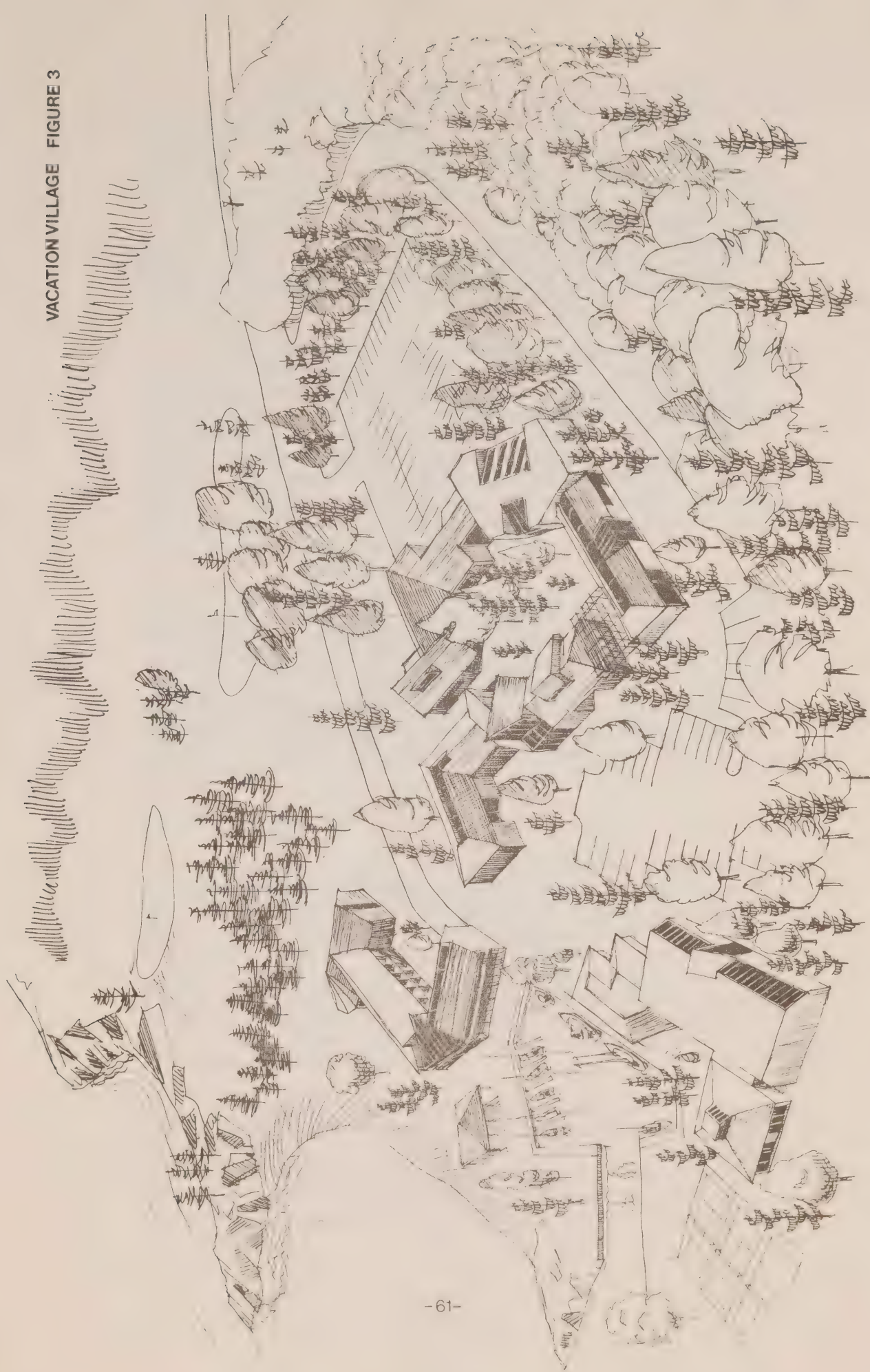
The theming should not stop at the exterior of a structure. Interiors too can be planned and developed in keeping with the heritage image. Furnishings, lighting and art work can all convey the image. It can be carried to the tableware and the dress of uniformed staff. Those communities and projects that undertake proper theming reflecting the images of their particular area will, all other things being equal, fair better in the competitive business of tourism than those who ignore it.

b. Development Guidelines by Opportunity

a. Vacation Village

- (i) Site Selection: Water access is paramount along with good and easy access. The site should have a variety of topography and contain both mature forested areas and open land offering water vistas. Soil conditions will also be important for the ease of construction and the installation of services. Site drainage should be carefully examined to determine that most of the site can be developed without drainage problems. Land area assembled or under one ownership should be a minimum of 1000 acres and up to 2500 acres.
- (ii) Servicing: The development should be sited and planned in such a way to insure that an adequate supply of quality water for human use is available. The layout of structures within the village should be such that central or core areas can be economically serviced. The water course on which the village is located should be capable of accommodating waste water disposal consistent with appropriate environmental guidelines and standards.
- (iii) Facilities Planning: More details of the facilities and concept for the Vacation Village are covered in Appendix A. Recreational facility planning is most important not only to ensure the proper facilities are offered, but also to ensure their correct disposition. Recreational interests change... today tennis...tomorrow perhaps a return to croquet or billiards. Flexibility in layout permitting economical conversions when required is important. Development of a successful Vacation Village is not a small project; expertise in the business plus outside professional advice in addition to adequate financing is essential.
- (iv) Theming: The appropriate theming will depend upon the specific location being developed for a Vacation Village. Three Sub-zone locations have been identified where market and resource factors make the project feasible. These are in the Quinte, Thousand Islands and the Rideau Lakes Sub-zones. Structures rendered in a California "Spanish" style will not fit in anywhere. Even though it may sell, it will not yield the returns possible with a design appropriate for the location, site features and climate. Materials, costs, construction complications and energy costs will all add to the inefficiency of an inappropriate design.

VACATION VILLAGE FIGURE 3



In the Quinte Sub-zone appropriate theming would integrate the Vacation Village with the expansiveness of the landscape. Low-rise structures seem most consistent with the landscape. The specific theme could be water oriented or "nautical" to capture the image of sailing, beaches and long uninterrupted vistas. "Beach" or "seaside" architecture would fit this location quite well. A heritage theme would also be appropriate. Here the architectural style should attempt to capture the "Victorian revival" details found on heritage buildings in the area. This could only be economically expressed in modern terms with modern materials.

The Thousand Islands Sub-zone might require a different treatment. The "nautical" theme might have some merit but even more appropriate would be an attempt to revive the resort architecture of the 1920's and 30's expressed in modern terms. In this case, wood would be the most appropriate material. Many of the heritage buildings also are of limestone and brick in this area. Using masonry and architectural details similar to those found in earlier buildings should also prove successful. Figure 3 illustrates how the Vacation Village might be themed for the Thousand Islands.

The theming in the Rideau Lakes area could be quite similar to that used in the Thousand Islands. Here, however, the "nautical" theme appears even less appropriate. The 1920's and 30's resort architecture, as updated, would seem the most desirable form. A more rustic architectural rendition might also be acceptable here since there still exists a number of structures in the area constructed of large square timbers. Possibly a theme based on Colonel By canal construction era might have merit.

b. Destination Resort:

(i) Site Selection: Here, site selection should centre on the four-season components of such a resort. Topography for downhill skiing will be important, as will good year round access. Acreage requirements will exceed those of a Vacation Village with 3,000 acres being considered minimum. The site will require a variety of landscapes; not only mountains but also lakes, rivers and streams. Soil conditions will be a factor affecting construction costs. Development areas should be well drained. Some 500 plus acres would be considered suitable for intensive development.

(ii) Servicing: An adequate water supply will be required, plus a water course that can accommodate sanitary waste disposal. This will have to be examined in light of 1000 to 1500 units. It is anticipated that the central core area would be on full services and in accordance with good engineering practice. Environmental criteria and standards are still required for this project.

(iii) Facilities Planning: The facilities planning for a four-season destination resort will be substantially the same as that required for a Vacation Village. Particular attention will have to be given to the winter recreational activities. Again professional advice is paramount.

(iv) Theming: Since the Madawaska Highlands seems the most suitable location for a destination resort, the theming should be consistent with that environment. Heavy timber construction with log clustered units and detached units seem most appropriate. A "rustic" appearance must be sought. Such an appearance can be captured in a more contemporary style using steep sloping roofs and vertical or diagonal siding. Numerous examples of destination resorts in the north eastern U.S. can be used as a reference for this project. Figure 4 gives an architectural approach themed to the wilderness image of the Madawaska Sub-zone area.

c. Resort Hotel

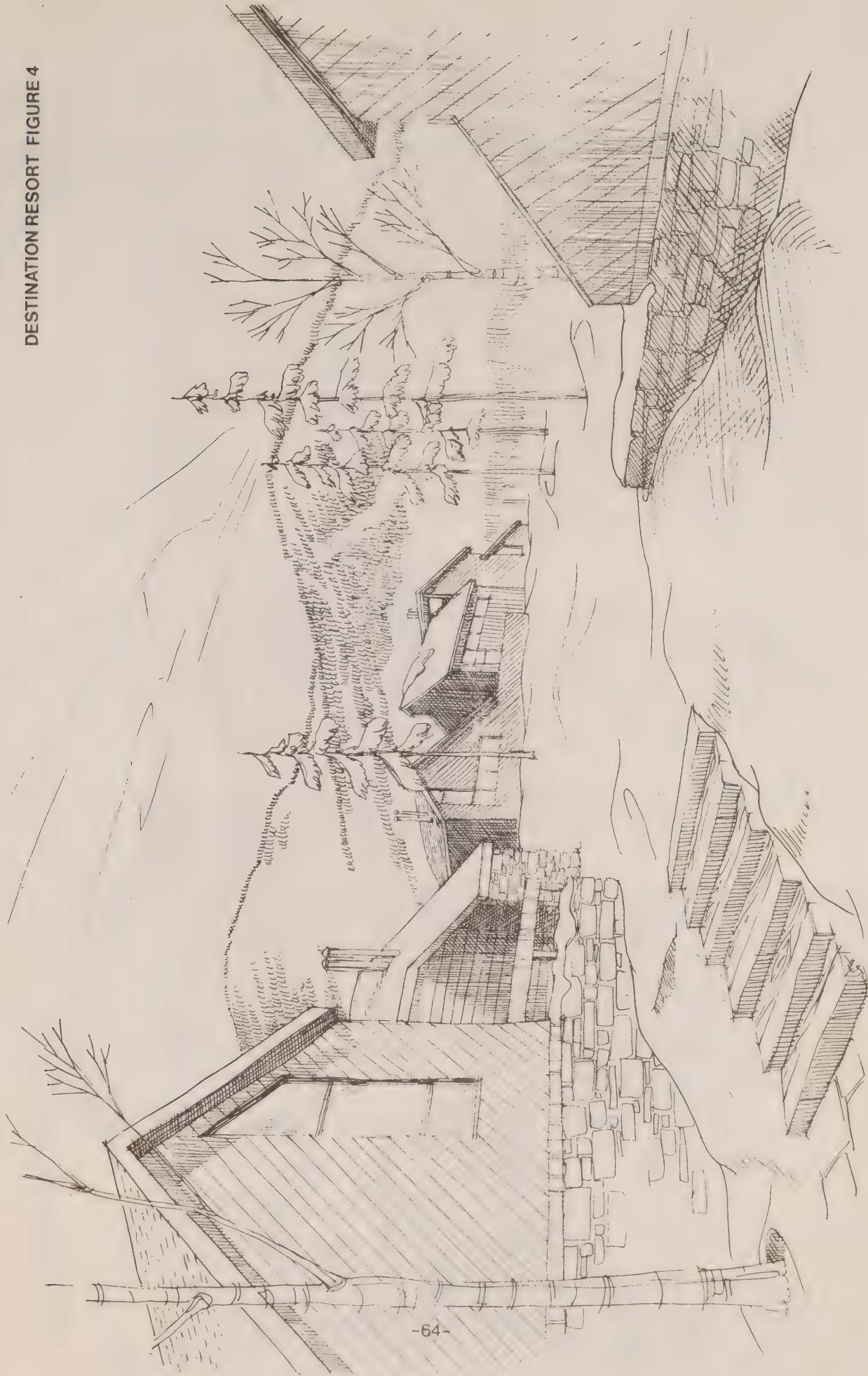
The location suggested for this identified opportunity is in the Rideau Lakes. Co-operative approaches by present resort owners in the area to expand their present facilities is one way of realizing the opportunity, especially since suitable sites are not easily found for such a facility.

(i) Site Selection: Either expand on existing sites or select a new site of approximately 10-20 acres. Direct access to water and a good road system is essential. On-site major tree cover is important as is gently sloping topography to properly site buildings, parking areas and shoreline facilities. Here conditions suitable for the installation of private on site services might also be critical. The site must be well drained.

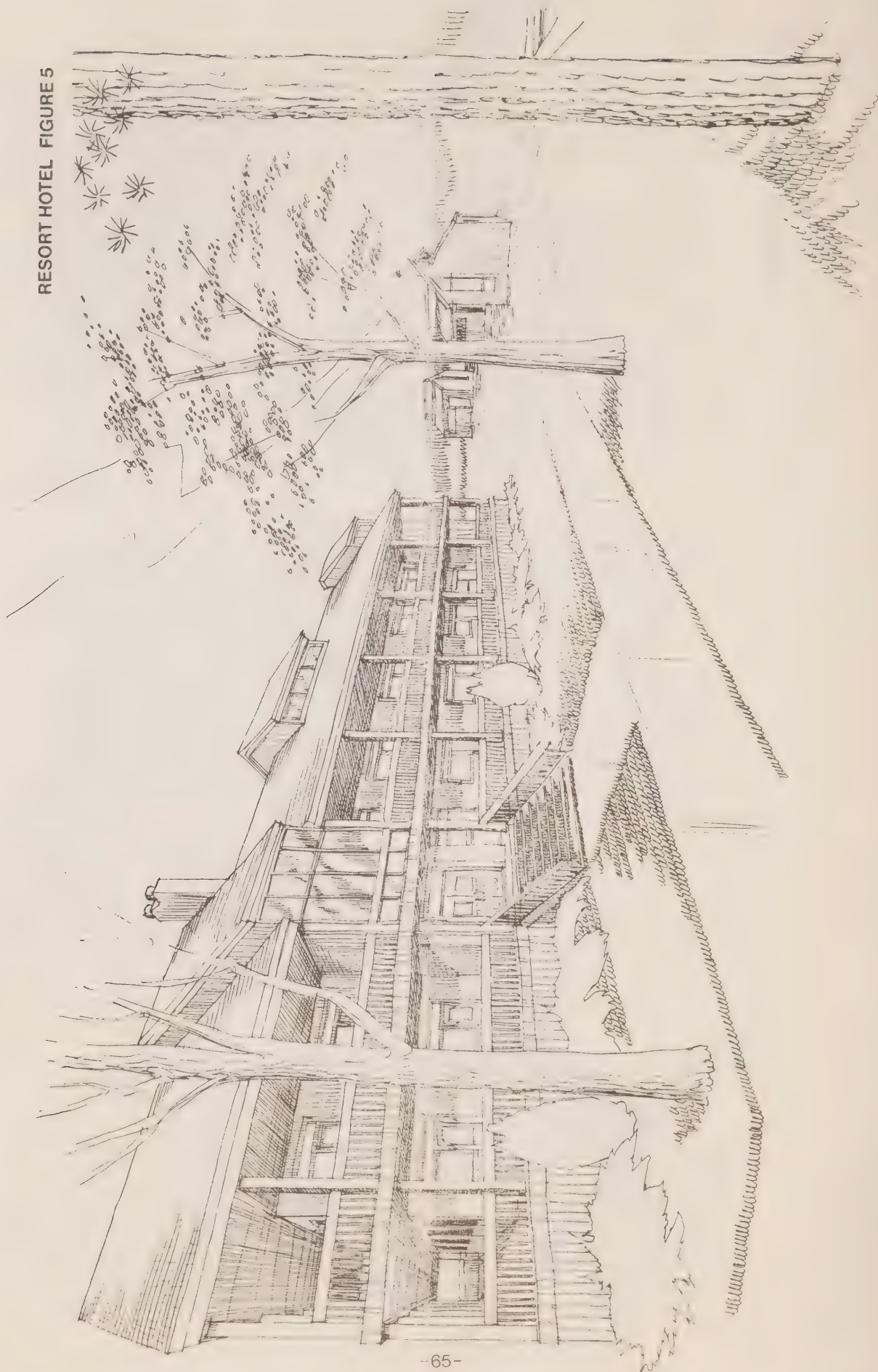
(ii) Servicing: A resort hotel of approximately 100 rooms would have to be on private services unless it was in an area where full services already exist. Those locations most suitable for such a facility are not now serviced. An adequate supply of quality water must exist for the facility. Soil conditions would have to be such that private services could be installed in a manner acceptable to the Ministry of the Environment.

(iii) Facilities Planning: It is important that the planning include off site factors as well as those on site. Entrance roads and signing should be consistent with the images of the area. A full range of activities, including those to take place indoors should be planned and developed with the guests in mind. The facilities should also be planned to accommodate conference and group gatherings. The resort should be linked to both road (bus) and boat tours. Consideration should be given to "package" tours from the resort including urban trips and "fly-in" operations to more remote facilities elsewhere in the Zone. Referrals and guest exchange for different activities should be considered between operators in the area.

DESTINATION RESORT FIGURE 4



RESORT HOTEL FIGURE 5



(iv) Theming: A new resort should reflect "The Way We Were" image of the Rideau Lakes. It is felt that this can be captured without the duplication of earlier architectural renditions. Gothic arched windows are gothic arched windows whether in a contemporary styled structure or in a heritage building. Although limestone structures do exist in the area, wood frame seems to predominate. One image that no one has capitalized on yet is that of the Rideau Canal itself. The interior of a resort could be quite interesting if decorated with the canal image in mind. Figure 5 shows how resorts in the Rideau Lakes might be themed to fit the image of the area in both existing structures and expansions. Some basic similarities between resorts at one end of the Rideau System with those at the other end in theming could go a long way to conveying to the tourist a certain "to be expected" standard of quality and consistency.

d. Urban Hotel

(i) Site Selection: A downtown waterfront site in Kingston large enough to accommodate a 200-room hotel, off-street parking, convention centre and office space, would be ideal. In order to achieve the densities required, a highrise facility should be permitted under any zoning restrictions. A site size of 5-8 acres would be desirable. Steep sloping sites and those with poor soil conditions should be avoided.

(ii) Servicing: Full urban services would be expected for this facility including sanitary sewer, storm sewer and a piped water supply. Servicing should be adequate to handle the entire complex, not just an urban hotel.

(iii) Facilities Planning: An opportunity exists in Kingston for facilities beyond those integral to the hotel itself. A convention centre appears to be required. This centre could also serve as a tourist or visitor attraction plus provide space for various community functions. If a residential and office component existed in such a waterfront complex, there would be even more need for the community space. Some careful and detailed planning is required to properly site these possible facilities or even the hotel alone for that matter.

(iv) Theming: An urban hotel in downtown Kingston should not clash with the already substantial amount of renovated heritage buildings. The "heritage city" image is strong; it should be reinforced in a new urban hotel. The architectural theming could combine the heritage resource with the military history and pageantry image that now exists in Kingston. Some limestone might be used plus details resembling the military architecture of Old Fort Henry or the Royal Military College. Such detailing would not preclude the use of modern materials or even overall modern styling. The landscape architectural design for the site could also capitalize on the heritage image in either a historical military view or perhaps a moat linked to the lake shore in another historical rendering for the site. Interior decorating could easily incorporate vestiges of the military image, one obvious item being the uniforms of the staff. The options for a naval (military) theming might also have merit. Sympathetic architectural theming of a new downtown hotel in Kingston could be an exciting adjunct to the City's already active tourist environment. Figure 6 illustrates how this might be done.

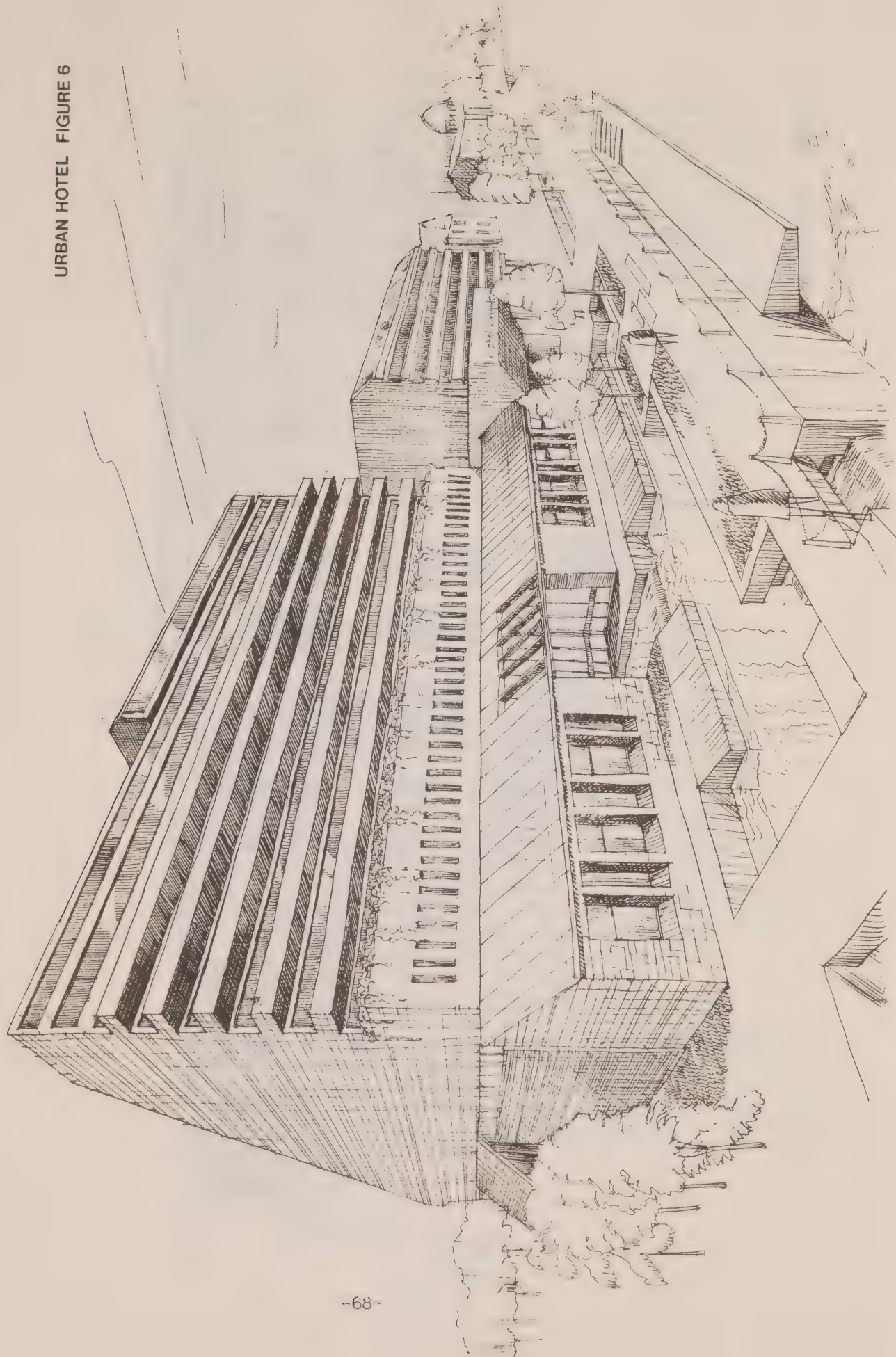
e. Heritage Inn

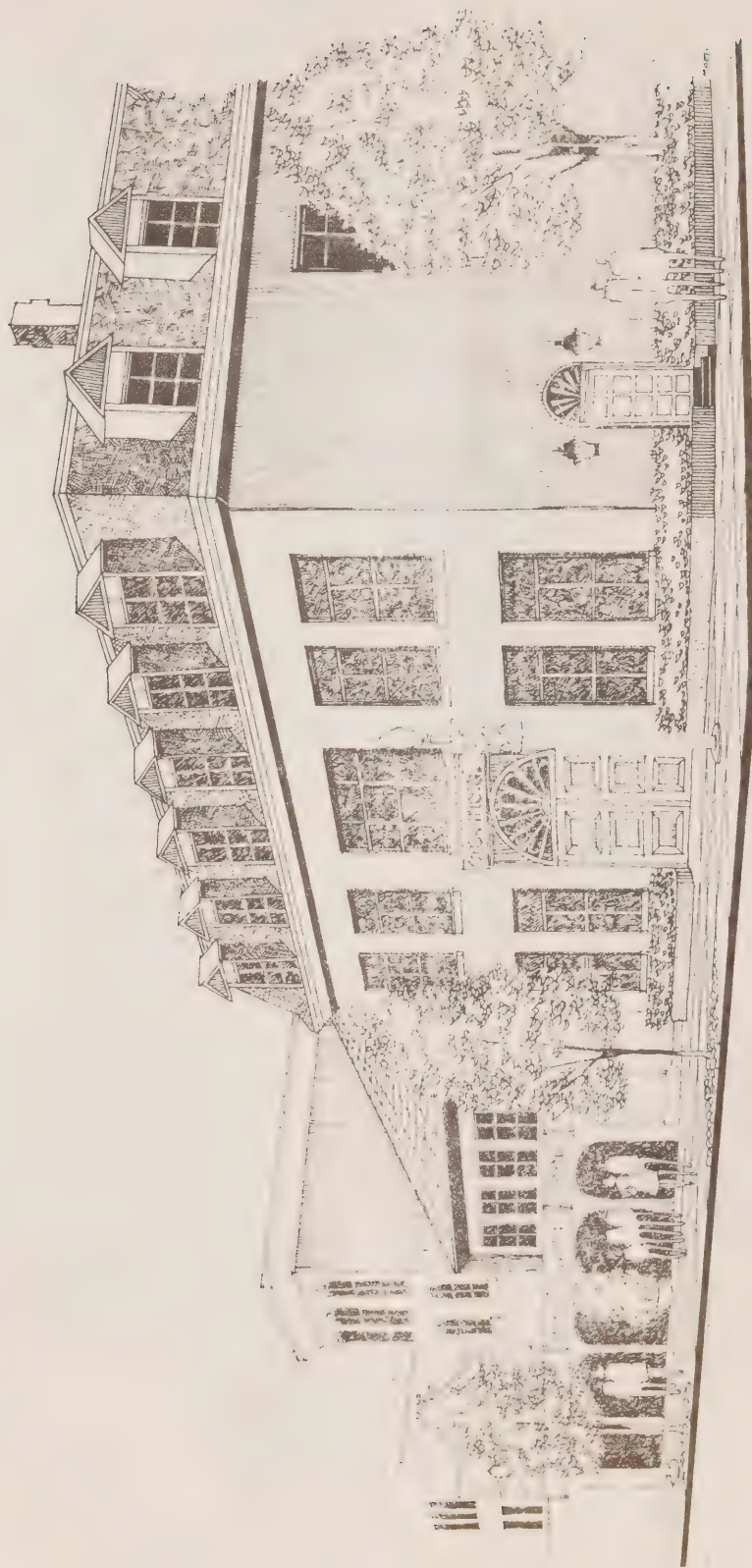
(i) Site Selection: A downtown location is preferable hopefully with nearby off-street parking. If an existing structure is to be used, then a structural evaluation should be conducted with complete costs given for any major renovation work. Detailed marketing work to determine the best site will be required for this opportunity.

(ii) Services: It is anticipated that full municipal services exist in those locations where a heritage inn would either be in a renovated structure or newly constructed.

(iii) Facilities Planning: Details of this project are found in the project profile sheets in Appendix A of this report. In addition to rooms, dining facilities, lounge, bar, coffee shop, etc. would all be required. If properly and creatively planned, a heritage inn could be an interesting approach to capturing increased tourist traffic to the area. An unimaginative hotel conforming to the many existing facilities will not likely succeed in capturing the same market.

URBAN HOTEL FIGURE 6





(iv) Theming: The opportunity for a heritage inn exists in several locations in both zones. No one is yet fully exploiting this potential. A number of motels are being constructed in the zones that are taking up the existing demand. These are primarily oriented to the commercial traveller. None are theming their development to reflect the heritage image of the zones. It is likely that the heritage inn project might be a part of a downtown renovation scheme. A number of municipalities in both zones are embarking on such programs at this time. One example of how an existing structure might be simply altered externally is shown in Figure 7. This exterior treatment was reflected in the Official Plan for the Town of Gananoque. Interior work would also be important in a heritage inn renovation. It too should be themed to reflect the image of the area. In addition to a renovation project, the opportunity does exist for a new hotel or inn of about 50 units in various locations within the Zones. A new facility could still capture the heritage theme in its architectural design. It may be necessary for some design control to be exercised at the local level to assist in achieving this opportunity.

f. Commercial Attractions

(i) Site Selection: The most important elements of site selection are visibility to a large volume of traffic and excellent access. Such sites exist in numerous locations within the Eastern Ontario zones. Topographic features are also important depending on the attraction, gentle topography likely being required for most attractions. Average requirements will vary from three to four acres for a small attraction to several hundred for a large facility.

(ii) Servicing: Full services are not considered mandatory for small attractions; even a large attraction may not require full services, depending on the land area available. Most sites will likely be outside of urban areas or on the fringe of such areas where services do not exist. Good engineering practice and environmental controls would have to be exercised in any location.

(iii) Facilities Planning: The actual details of development will depend on the particular attraction to be developed. Of prime concern should be the desirability of blending any attraction into its surroundings while still signing in such a manner as to attract visitors. Considerable opposition will arise to commercial attractions if they are not designed to harmonize with their environment, thus impeding approvals.

(iv) Theming: Wherever possible, commercial attractions should be developed so as to relate closely to the image(s) of the particular area. The theme of the attraction itself should capitalize on the image of the area. Those opportunities identified in this report, either major or minor, it is felt should relate closely to the image of the two Zone areas. The actual design of any structures, exhibits, etc., should, where possible, reflect the image of the area. There is little reason that the exterior appearance of a structure must be aesthetically displeasing on the basis of promoting the attraction or exhibits contained therein.

g. Marinas and Campgrounds

The guidelines and theming for marine touring facilities and commercial campgrounds are quite similar.

(i) Site Selection: The marine facilities obviously require shoreline to be successful as do the campgrounds. Site size will vary for the facility required, the minimum for a campground being about 100 acres. Excessively steep or poorly drained sites should be avoided. Environmentally sensitive areas should also be avoided. Before acquiring land for a marina, a marine touring complex or a campground, and potential investor should investigate the regulations and various approvals required for development. (Appendix F)

(ii) Servicing: Central services of some kind will be required for both operations. Pumpout facilities will be required in a marina. The campground will require a communal water system and likely either a common septic tank field or holding tank. Proper storm water drainage improvements will also be required. Other services will include hydro, telephone and a heating source.

(iii) Facilities Planning: Considerable literature exists on the planning and development of marina and campground complexes. Professional advice should be sought to ensure the most appropriate and efficient layouts related to the demands of the market. Innovative approaches are needed in both the planning and development of marinas and campgrounds. Marinas, where possible, should be combined with other forms of development such as accommodation. Campgrounds should be near enough to man-made attractions to provide opportunities for users to enjoy a variety of activities, especially in inclement weather.

(iv) Theming: Both marina and campground complexes can and should be themed to reflect the image(s) of the area as well as to fit in architecturally with their surroundings. Structures in a campground complex could be constructed of logs, and rail fences could be used in more remote locations. The nautical theme appears most appropriate for the marina complex but has rarely been used. The private campground operator (existing or potential) could gain much from the public sector in the layout and detailing of campgrounds, a gain that could also be financial in many cases.

SECTION V -- STRATEGY AND IMPLEMENTATION

A. GENERAL

Any strategy consistent with the purpose(s) of this study must aim at the realization of the development opportunities identified earlier. Existing operators, travel associations, local municipalities and the provincial government must work together if the private sector is to invest in and develop new facilities in the area. These same groups will also have to work together if the existing plant is to be maintained and improved. In this section the report will discuss what each group should do in order to bring about new tourism opportunities and improve those existing in the area.

B. COOPERATION AND PACKAGING

a. Cooperation

This part of the section is aimed primarily at the existing tourist operators in the area. At present there is little cooperation between operators. Few joint projects exist where one operator, say with accommodation, has made arrangements with another, say boat cruises, to the mutual advantage of both. Earlier in the report, under Opportunities, some large and a number of small opportunities were listed where operators could through cooperative efforts improve the tourism picture in their specific areas. An example is given here showing where a resort motel operator, through a cooperative program, could improve the tourism experience and likely extend the tourist stay thus improving his own business.

Contacts

Resort Operator

- . Fishing & Hunting Guides
- . Boat Tour Operators
- . Attraction Operators
- . Automotive Service Centres
- . Travel Association
- . Municipal Officials
- . Other Resort Operators
- . Marine Service Centre
- . Retail Outlets
- . Tour Guides
- . Others

The resort operator can arrange to have fishing and hunting guides available for guests. He can also either book or buy tour tickets (at a discount) on boat trips, train trips, special air charter trips, etc. He can develop his own tour packages. By prior arrangement, perhaps a commission, he can have available and sell tickets for various nearby attractions; his knowledge of the attraction can also interest the tourist. He might make arrangements with a nearby

auto service centre for emergency repair and other services. A discount arrangement could likely be made with retail outlets in the area that would be of benefit to his guests and, in turn, the retailer. This might be especially appropriate for gift shop operators or arts and crafts producers. Using a resort foyer for display of local art work is good business for everybody. Having tickets to summer theatre or even the movie theatres and providing some billing to what is playing can also help the resort and the theatre operator. Referring guests to specialty dining locations can also be advantageous. A water oriented resort might be catering to tourists arriving by water. If complete marine services are not available at the resort, assisting the guests to reach such facilities, if required, can only help the resort operator. Participation in community programs and financial sponsorship of community activities can also help the resort owner. Resort owners in a particular area, along with the other tourist operators, could sponsor a number of local programs and projects that would benefit the area and in turn, their own operations.

Existing operators should work together on promotion of the area and on specific packages for the tourist. Existing operators could also share on their purchasing of supplies and services, thus reducing their costs. Cooperative efforts in theming so that the physical developments of the area have some continuity and an appearance that attracts visitors should also be followed.

b. Packaging

The tourism zones of Eastern Ontario offer some opportunities for "packaged vacations" catering to a wide variety in market and being able to provide a wide range of activities. It is possible, for instance, to provide first class accommodation and food at a resort in the Thousand Islands area, take a boat cruise or bus/auto tour to Kingston or Ottawa and a fly-in trip to a remote location in the Madawaska Highlands for fishing or canoeing. All of this can be done in a few days from one base location such as the Rideau Lakes, Quinte area or, as mentioned, the Thousand Islands.

Little 'packaging' is being done within the Zones. If prepared properly, such packages could attract more tourists. The "package" should offer a better price than if the visitor were to make a number of separate outings himself. Some example packages that might have merit are discussed below:

Naturalist Package: This could include transportation to the base resort which might be in the Rideau Lakes area, as an example. Good accommodation and food must be available at the resort. Short first day or second day trips would be arranged from the resort with a guide (a naturalist) to study bird life along the Lakes system. An overnight campout might be provided. The

third and fourth day would be a fly-in trip to a remote area in the Madawaska Highlands or the Kaladar Frontier. Canoes would be flown in and used on the trip. An overnight stay or two would be a part of this wilderness adventure. A naturalist guide(s) would be required on the trip. Return would be made to the base resort for some "summing up" lectures and comparison of notes. Dinner and lodging would be provided at the resort. After breakfast the next morning, transportation would be provided back to the visitor destination (either home or airport).

Touring Package: Again the visitor would take accommodation and meals at a base lodge. Transportation to the lodge could be part of the trip. A boat tour might take the visitor from the Rideau Lakes to the City of Kingston. Overnight accommodation and meals would be provided in Kingston. In Kingston guided "heritage" tours would take place, some on foot. The duration of the tour might be one or more days. The visitor would return to the resort for dinner and an overnight stay. After breakfast the next morning they are returned to their point of origin. A variation on this trip might be a boat tour along the St. Lawrence stopping at various ports and points of interest. Heritage would be the main focus. Ottawa might also be substituted instead of Kingston or possibly both cities could be covered.

Fishing/Hunting Package: In the spring, summer or fall a packaged trip catering to the outdoor sportsmen would have merit. The resort base might be in the Thousand Islands, the Rideau Lakes or the Madawaska Highlands and the Kaladar Frontier. A fall package in early October could provide a fishing/hunting (small game and waterfowl) combination. It is the last time of year for warm water species including bass, pike and muskie. "Fly-in" trips to the lodge from Toronto, Ottawa, Montreal or the U.S. could be a part of the package. More remote fly-in trips could also be offered. If carefully planned, good fishing and hunting could be achieved for less cost than some of the similar offerings in other areas of Canada or elsewhere in the world. Expert guides would be important for such a package.

Cruising/Sailing Package: Transportation is included to the point where the cruise begins. First day or night arrangements with hotel or resort operators for lodging and meals would be made for the participants. A cruise either by power or under sail would then begin either on the St. Lawrence, The Rideau system or from the Bay of Quinte. Excellent cuisine would be expected. Some port stops would be included with return to the point of origin several days later. Qualified personnel aboard ship would be essential. The area lends itself to a wide variety of cruise/sailing packages. Any package should offer the visitor plenty of flexibility, privacy and free time to "do their own thing". A rigid

structure or timetable format to a package will likely put the visitor off. If successfully done, return visits can be expected and so can referrals. Packaged vacations require considerable cooperation between operators in the area, detailed planning, a substantial financial outlay at the beginning, and high promotional costs. Once implemented and the wrinkles ironed out, the packaged vacation can be quite easy to handle and less costly.

C. IMPLEMENTATION RESPONSIBILITIES

The responsibilities for the various groups essential to the tourism planning and development process are suggested in the following pages:

a. Existing Operators

Perhaps the group most responsible for achieving those goals and objectives of the Zone are the existing operators. The following sets out their role within the development strategy.

- a. Local influence: After they have read and understood the report, the existing operators should discuss the findings amongst themselves with the aim of setting out a course of action at the local level. They should, wherever possible, influence the local municipalities to accommodate those opportunities identified for their particular area.
- b. Cooperation: The existing operators should, where possible, undertake those opportunities identified on a cooperative basis. In particular those projects that will stimulate interest in the whole area should be sponsored by the existing operators. Cooperation should also take place between operators to promote the area and attempt to solve common problems. Every effort should be made in cooperative efforts to achieve common theming for their specific area.
- c. Improving Plant: Even though new developments in the zones should improve business, the existing operators will still have to improve their existing facilities. Poorly maintained facilities damage the image of the area. Improvements should be themed along the lines covered in this report.
- d. Diversifying: There are ample opportunities in all Sub-zones to diversify existing operations. In almost all Sub-zones, new attractions are required and are justified based on the demand analysis made in this study. Diversity can be achieved through the cooperative efforts of existing operators, which should encourage longer and repeat visits.

- e. Packaging: Local operators by working together and through careful planning should develop vacation packages for their area. There are opportunities for interaction between Sub-zones and even Zones. When packaging plans are developed, The Eastern Ontario Zones, unlike many competing areas, have enough variation in resources to permit vacation packages that would provide considerable variety in vacation experiences. The packaging programs will go a long way in increasing volume and quality of the travel experience; they will also provide diversity within the Zones.

- b. Travel Associations

The prime role of the Travel Associations for promotion should continue. The findings of this study can assist the Association in their role, more specifically:

- a. Promotion: The Associations should use the images discussed in this report as the basis for much of their promotion. The Association should also actively promote the theming of new developments or existing ones with potential and existing operators.

- b. Others:

- (i) The Travel Associations should continue to actively represent the interests of tourist operators at the Zone and Sub-zone level. The Associations should be assisted in this activity by the Ministry of Industry and Tourism to foster cooperative ventures.
- (ii) The Travel Associations in their role as representatives of the private tourist operators should monitor the planning and development programs of local municipalities, counties, regions and agencies in order to ensure that the principles of this strategy are understood and incorporated. This function would ideally be in cooperation with local representatives of the Ministry.
- (iii) An advisory group should be drawn from the appropriate members of the Travel Associations to work with the Ministry of Industry and Tourism when required. This advisory group should furnish advice and council with respect to specific development projects, identifying potential investors, and promoting the investment merits of the Zone.

c. Municipal Government

The value of tourism to a community is often underestimated. It is one industry given little if any recognition in the Official Planning process and one that is often hampered by zoning controls that are unnecessary. The municipalities' responsibilities are:

- a. Tourism Planning: Detailed planning at the local level should be undertaken in order to establish the policies for tourism development. What is and what is not acceptable to the local government? Development control provisions should follow the more comprehensive planning. More details of tourism planning are provided in Part 'd' of this section.
- b. Opportunity Review: Local municipalities should examine carefully the findings of this study. Both major and minor opportunities have been given locations, some more specific than others. They fall into some municipal jurisdiction. If the opportunities identified appear to have merit in the eyes of the municipalities, then they should prepare for dealing with the development applications that may follow. The identification of these opportunities can, in a general way, assist the municipalities in their local planning. Market demands are such that many municipalities and joint planning areas will have to deal with specific projects in the future; they should be aware of them now.
- c. Image and Theming: Municipalities can perhaps do the most to improve Sub-zone images and ensure proper theming. Programs at the local level, especially visual improvement programs and recreational improvements, probably have the greatest impact on travellers to the area. Visual eyesores should be removed and prevented from occurring in the future. Attractive street-scapes, parks, watercourses and roadside development can do much to improve the visitor's impression of the area and establish a framework conducive to expanding opportunities. Short-sighted local planning and development is probably the greatest deterrent to improving the environment for tourism. It usually costs the area more money in the long run than it saves by developing projects that are less attractive and inviting than they could have been.

Through development controls, municipalities can regulate construction to ensure that new projects are representative of the area's image and are themed accordingly. Larger municipalities have been doing this for sometime; the smaller municipalities should institute such "design" control now.

- d. Local Projects: In this report a number of development opportunities have been identified. Many are most appropriate for local municipal or joint municipal support. The municipalities should examine these opportunities, and through a sub committee of Council or Planning Board, follow up on those that would have merit for their particular area. The municipalities should seek the cooperation of existing operators on some of these projects as well as the Provincial and Federal governments. Some projects of particular note are:
- . Boat or car racing
 - . Museums
 - . Summer Theatre
 - . Cultural Centre
 - . Heritage building preservation and renovation
 - . Industrial attractions and tours
 - . Auto touring routes.
- e. Coordination: Municipal governments are often in a position to coordinate the diverse and sometimes competing interests in those areas which affect tourism. Clear and concise local tourism policy coupled with a coordination role might make the tourism planning and development process more efficient. Besides there are a number of things that municipalities can do to ensure cooperation between operators, advertising is but one example.
- d. Provincial Government
- a. Ministry of Industry and Tourism
- It is not possible nor desirable that the Ministry of Industry and Tourism attempt to impose any definitive plan on others for the two Zones, nor is it appropriate for the Ministry to coordinate all the various activities required to bring about development of the various opportunities identified. Instead the Ministry's role should be more specific and limited to those areas where it possesses expertise or has the capacity to assist in implementing the findings of this study. Within this framework the task is significant requiring considerable and continuing effort. The responsibilities are covered below:
- (i) Public Sector:
- The strategy here basically amounts to a number of things the Ministry should do to foster acceptance of the development opportunities within the policy guidelines of other Ministries and other public agencies (federal, provincial, local). They are as follows:
1. The Ministry should adopt the Zone studies and so inform other Ministries and agencies. Copies of the Study should be circulated to all appropriate groups within the public sector.

2. Following release of this Study, the Ministry of Industry and Tourism should work with appropriate Provincial Ministries to prepare broad guidelines to assist investors and entrepreneurs wishing to prepare submissions for any of the development opportunities identified in this Study. Known and consistent policies pertaining to the development opportunities in order to encourage investment should be sought from such an undertaking.
3. The Ministry of Industry and Tourism should liaise with other Provincial Ministries in the development of more detailed criteria and standards consistent with Provincial policy that will expedite implementation of the projects.
4. In their daily contacts with the community and development interests, the Ministry officials should be able to accurately and clearly explain various development opportunities within the Zones. Detailed training sessions for field staff may need to be conducted within the Ministry of Industry and Tourism pertaining to the development opportunities and implementing strategy covered in this Study.
5. Briefing sessions with the Eastern Ontario Development Corporation should be conducted to review the findings of this Study and assist EODC in establishing lending policies consistent with the directions now available in this document.
6. The findings and recommendations of this Study should serve as the basis for the Ministry's input to the official planning process within each Sub-zone consistent with guidelines established by the Ministry of Housing.
7. Brochures, slide shows, movies, and/or other material developed primarily for the private sector should also be used in liaison efforts with the other Ministries and agencies by the Ministry of Industry and Tourism.
8. Consideration should be given to the creation of an "operation group" within the Ministry of Industry and Tourism capable of funding and constructing certain capital works projects. Certain works desirable in the implementation of some of the identified development opportunities that might be included within the jurisdiction of the Ministry are:
 - improved access routes
 - shoreline improvement
 - boat mooring facilities

Care must be exercised here that such works are an integral part of the development opportunity and not segregated facilities competing with the private sector.

(ii) Private Sector

1. A detailed public relations program should be developed by the Ministry of Industry and Tourism related to the identified opportunities. A professionally prepared brochure setting out a description of the development opportunities should be sent to a selected list of individuals and groups as part of this program. In addition, a slide show package or movie should be prepared covering the findings of the Study aimed at showing potential development interests and the types of opportunities available. Sufficient statistical and support data covering supply market demand, etc., should be interwoven throughout the narration.
2. As part of the Ministry's strategy, seminars should be held whereat selected investors and representatives from the development community would meet to discuss in some detail the identified opportunities, and the Ministry's role in implementation. Such seminars could be scheduled in both Canadian, U.S., and perhaps other cities with selected and representative interests being present.
3. The Ministry should assist the private developer/investor in gaining the necessary government approvals for those projects consistent with this Study and the suggested themes for the various Sub-zones.
4. The Eastern Ontario Development Corporation should assist the private sector in financing those projects consistent with the findings of this Study.
5. If special studies are required in order to realize certain identified investment opportunities within the Zones, the Ministry of Industry and Tourism should consider funding them. Such special studies may be required from other Provincial Ministries or other public agencies.
6. The Ministry of Industry and Tourism in conjunction with the Travel Associations should examine in detail its present marketing strategy for Eastern Ontario. In particular, the following elements of its marketing strategy should be carefully scrutinized:
 - Where is the bulk of promotional advertising now being directed? For example, the Montreal market certainly requires more attention and the U.S. market areas require new approaches.
 - Is there a comprehensive and cohesive marketing strategy related to the attributes of the Zones? It is not apparent from the research undertaken for this Study.
 - In the Ministry's marketing efforts, is there too much emphasis on "selling" Ontario and too little on "selling" more specific

areas of Ontario? It is suggested that more attention be given on a Zone basis in order to maximize returns from promotional expenditures.

- Are the marketing efforts of the Ministry comparable with those of Ontario's competition? If not, some of the opportunities identified for latter phases may not be realized.

b. Ministry of the Environment

The Ministry of the Environment has a key role in improving the opportunities for tourism in Eastern Ontario within their mandate of protecting the quality of the environment.

(i) General

Clear and concise environmental policy on a provincial and regional level as it affects new and existing development is essential. Where existing uses are causing an environmental problem, strict enforcement of environmental regulations should occur and general guidelines for new development related to the magnitude of the development should also be made available. The guidelines for a cottage should obviously be different than for a project proposing several hundred units. These general guidelines should be developed in conjunction with the Ministry of Natural Resources and the Ministry of Industry and Tourism.

(ii) Specific:

Based on the opportunities identified in this Study and in particular those major opportunities, the Ministry should develop specific guidelines, standards and criteria for the projects. Again this process should involve the Ministry of Natural Resources and the Ministry of Industry and Tourism; and it should begin now!

c. Ministry of Natural Resources

In addition to the liaison with the Ministry of the Environment and the Ministry of Industry and Tourism, Natural Resources has some other responsibilities affecting tourism development in both Zones.

(i) Outdoor Facilities

Within both Zones there are a number of opportunities for the Ministry to expand and improve the outdoor recreation experience. Wilderness parks are particularly significant in this regard. The Crown holdings in the Kaladar Frontier and Madawaska Highlands are large. Consolidation of these holdings with some expansion can create large wilderness preserves or parks for the use of visitors to the area. The present Provincial Parks and campgrounds must be carefully controlled consistent with the environmental regulations of the Ministry of the Environment. Overuse or overcrowding can cause serious environmental problems.

Hiking trails, cross country ski trails, canoe routes and other linear systems can be added to the zone. Proper signing and maintenance is required. These linear facilities can dovetail quite nicely with some of the opportunities identified in this report.

(ii) Fish & Wildlife Management Programs

Many of the opportunities identified in this report could increase the pressure on the fish and wildlife resources of the area. It is anticipated that the environmental controls will be such that the identified opportunities will not have serious detrimental impact on water quality. In order to meet the intensified pressure, however, the Ministry should expand its programs for improving fish and wildlife habitat. Its budget requirements should reflect the need to increase stocking programs and to conduct the necessary research and studies to improve habitat as well as the research related to those species being introduced into the area. Other competing areas, particularly in the U.S., appear to be supporting their fish and wildlife agencies to a greater extent.

If the development opportunities identified in this study are to be fostered by the Provincial government, it must be aware that certain government programs will have to keep abreast of the increased use of the area's natural resources.

d. Ministry of Culture and Recreation

The role of the Ministry of Culture and Recreation should be expanded as it pertains to tourism development in Eastern Ontario. Certain areas of responsibility and some specific projects have been set out here.

(i) Resource Identification

The Ministry should expand its identification program for Eastern Ontario so that the heritage resource is located with descriptive material covering such elements as when constructed (if appropriate), original use, present use, ownership, condition, historical background and perhaps some rating of significance.

(ii) Heritage Programs

A stronger province-wide heritage program is required. Incentives to preserve and renovate heritage structures might better be achieved if Provincial and Federal programs could increase the incentive to do so at the local level. The Ministry should also be in a position to assist local studies such as those being undertaken in the Zones, by either helping to fund such studies or assisting in the actual implementation.

D. TOURISM PLANNING

This part of the section is aimed at setting out some specific steps that local municipalities or regional bodies such as Joint Planning Boards might take to plan for tourism development in their area. As mentioned earlier, very little is done at the local level to plan for tourism development. The official planning process, development control provisions and zoning can all be effective tools to improve the opportunities for tourism development. The present situation is such that many tourism development proposals justified by existing market demand are delayed by the requirement for special studies, Official Plan changes, unnecessarily restrictive development controls and zoning approvals that are not or cannot be given because the original by-laws did not provide realistically for tourism development. The following is a recommended approach to local or regional "Tourism Planning".

a. Overview

The Provincial "Framework for Opportunity" should be consulted so that the planning officials are familiar with the broad goals and objectives of the Provincial Ministry of Industry and Tourism. In addition the appropriate Zone studies available should be consulted in order to ascertain:

- . The overall supply and demand for specific opportunities on a Zone basis;
- . The overall resources (natural and man-made) that give rise to a tourism image for the Zone. Likewise Sub-zone resources and images must be examined;

- . The overall attributes and deficiencies of the Zone and Sub-zones;
- . Provincial policy and programs affecting the area.

b. Goals and Objectives

During this stage of the planning, detailed goals and objectives for tourism and its relationship to other local policy should be prepared and resolved by the local Council(s). A realistic assessment of the kinds of tourism operations sought should be covered. Also a realistic assessment of the locality's willingness and ability to foster certain programs and improvements should be spelled out. Key individuals in the area should be singled out at this stage to contact and assist in the program. The tourism planning approach as it affects the Official Planning process and zoning should be discussed with Council(s).

c. Local Data Collection

The planning group should collect on a local/regional basis all data related to the tourism resources of the area including:

- . supply data (details of local supply, numbers, conditions, etc.)
- . local operator interviews (determine problems and attitudes of local operators)
- . extrapolate demand figures (using Zone or Sub-zone data where available, determine approximate demand for locality)
- . heritage structures survey
- . Provincial-Federal programs specifically available or affecting locality
- . local plans, by-laws, controls etc.
- . local Tourism Industry Consultants from the Ministry of Industry & Tourism should be contacted for input at this stage.

d. Data Analysis & Report of Findings

During this phase of the work, the planning group should evaluate the data collected and prepare a report of findings for Planning Board or the local Council(s). The report of findings should indicate the attributes and deficiencies of the locality's resources, some appropriate images and identified opportunities for the locality. At this level the opportunities can be quite specific. Some may fall into the private sector; others into the public sphere.

e. Official Plan Evaluation or Preparation

If an Official Plan exists, it should be amended to incorporate the findings of the Study. If specific private opportunities have been found, then appropriate locations should be designated with specific policy guidelines on what is expected, being incorporated into the document. If the plan is being prepared, then the opportunities, location and policy should be incorporated into the new document. If prior to development, specific design review and agreements are to be required, the document should say so and examples of processing and agreements should be included in the Plan. Specific environmental requirements should be spelled out. Here assistance from the Ministries of Environment and Natural Resources should be sought. Public projects should be identified and specific guidelines developed to show how these public projects are going to be realized. Of particular importance is how the municipality will attempt to control the theming of tourism developments.

The level of detail may vary in the Official Plan or Secondary Plan depending on the area being covered. If a town or village exists within the planning area, then the plan should be quite detailed in those locations.

f. Official Plan Review

The Plan should be reviewed with various Provincial Ministries, in particular the Ministry of Industry and Tourism. Specific criteria and guidelines should be sought from the various Ministries. Local operators and key people in the locality should also review the document.

g. Official Plan Public Input

It is assumed that public input existed in the preparation of the document. Even so, public meetings should be held to discuss the tourism plan or the entire Official Plan if it is a new document.

h. Official Plan Modifications

The tourism plan amendment or new document should be molded to reflect comments from the review process as well as the public meetings.

i. Plan Adoption

The plan should be approved by the Planning Board and passed on to Council for adoption. Once adopted, it should be forwarded on to the Ministry of Housing for circulation and approval.

j. The Approved Plan

Once approved the plan should form a part of the Official Plan and consequently part of the official policy of the municipality. It should serve as the guide for private and public action in the tourism section of the local economy.

k. Implementation

The plan should be implemented in a number of ways, specifically they are:

(a) Zoning By-laws

The municipalities should prepare and adopt appropriate zoning by-laws that will help execute the tourism components of this plan.

(b) Development Control By-laws

Under the Provincial Planning Act, it is now possible to pass local Site Plan by-laws. Under these by-laws, considerable design control can be exercised over new projects including approval of detailed drawings and the execution of an agreement between the developer and the municipality. The agreement can cover the specifics of what each party is expected to do. This development control provision under the Act is probably the best device to ensure good development consistent with the image of the area and themed in accordance with that image.

(c) Capital Budgets

The capital budget is the best place for the municipality to implement its public project portion of the plan. Here street landscaping can be covered, public building renovations and preservation, new parks, walkways or recreation facilities included for construction. If a municipality is serious about tourism development, it must be reflected in the capital budget.

(d) Operating Budget

Here is where the municipality can provide funds for promotion and marketing assistance to the tourism community. Depending on its resources it may want to establish a position of Tourism Development Officer. If an Industrial Development Officer exists or the position is created, tourism development should definitely be a part of his responsibilities.

APPENDIX A*

OPPORTUNITIES

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* NOTE TO SECOND EDITION:

Appendix 'A' has been revised in this Second Edition. The rates of return for the project opportunities are based on existing or forecast conditions over the next five years and assume good performance in choice locations with experienced management.

In the First Edition, a fixed "hurdle" rate of return was selected for all project opportunities and various assumptions were made with respect to occupancy rates, room prices, etc. to achieve this hurdle rate of return.

APPENDIX A

OPPORTUNITIES

Introduction

Appendix A presents detailed information on a selected list of opportunities identified during this Study. The identification process involved a community contact program (Appendix E), a review of existing data and studies, an analysis of present supply (Appendix C), an analysis of demand (Appendix D), brainstorming sessions with Ministry officials, interviews with many Canadian investment firms, and the study team's ideas. This process resulted in a long list of projects (Appendix B) which in turn was reduced to the following short list of projects considered worth specific evaluation.

1. Vacation Village
2. Destination Resort
3. Resort Hotel
4. Urban Hotel
5. Heritage Inn
6. Large Commercial Attraction
7. Small Commercial Attraction
8. Commercial Campground
9. Marina/Marine Touring Complex
10. Cruise Ship

The following headings are used for those projects reviewed in depth:

- Concept
- Rationale for selection
- Financial profile
- Possible location
- Phasing

It must be evident to the reader that the following evaluations can be general only. The potential investor must subject any opportunity to careful detailed testing based upon the precise conditions applicable. The financial analysis of each opportunity is based on a "before depreciation, income tax and financing" return, as these factors are highly variable depending on individual investor circumstances. Each investor will want to re-compute the returns based on his specific circumstances with respect to depreciation, tax and financing options. Also, the cost of interest during construction, start up costs and initial working capital investments have been excluded from the calculations.

The profiles demonstrate the importance of relating a proposed project to the market, securing realistic capital cost estimates, determining acceptable price levels and probable use rates, ascertaining the internal economics and thorough financial planning. They are not intended as feasibility studies but as models to assist in the assessment of opportunities.

1. VACATION VILLAGE

i) Concept

A relatively recent tourism phenomenon is the Vacation Village or recreation community. A number of these projects have been developed in major tourism recreation areas in Switzerland, the United States, the Caribbean and elsewhere. Several developments of this type have been proposed for Ontario.

The essential feature of a Vacation Village is the provision of a well-planned mixture of housing incorporated with both community services and recreational facilities. Efficiency of land use, community access to scarce waterfront or other recreational resources and property management for rentals are common characteristics. Recreational facilities may be integrated with the village or ownership and operation may be independent.

Typically, a Vacation Village offers a wide range of individual homes, apartments and townhouses blended with a major recreational resource such as skiing, boating, or golf. Combinations of recreational resources are normally offered to ensure a wide variety of activities throughout the year.

The size of a village can vary from several thousand units to a few hundred. A village center offering shopping, restaurants and community services is provided as part of the overall plan. Beaches, tennis courts and a marina are often included as community facilities.

The housing units may be utilized by the owner on a seasonal or a year-round basis. While designed principally for leisure use, they also have appeal in some cases as retirement homes or principal residences.

As a means of highlighting some of the principal planning and financial aspects of a Vacation Village, an example has been prepared. This sample project has a 2,200 acre site, with approximately 4,000 feet of shoreline. It is assumed that all facilities will be available on site. The possibility of multiple use facilities could reduce the total acreage required.

The major components are as follows:

Village Centre

The core of the development offers resort, convenience commercial activities with tourist accommodation. A civic centre is included to provide library, health facilities, administration, maintenance, postal services, fire and security protection, etc.

Recreation Centre

This contains indoor and outdoor tennis, handball courts, a court games area that could be converted to skating in winter, playground facilities and equipment, storage lockers, showers and swimming pool.

It is assumed in the financial evaluation of this Vacation Village that the capital costs of the recreation centre and the village centre would be shared in the capital cost of the accommodation units. The operating costs of these facilities would be paid through the assessment on the houses.

Housing Units

There are 1,175 houses, of which 124 are low density, 479 are medium density and 572 are high density. These houses are assumed to be fully serviced with a waste treatment plant, a water reservoir of suitable size for fire fighting, local roads with bridges and collector roads. To offset the high rates assessed against these houses covering the normal property taxes, plus operating costs of the recreation center and the service center (\$1,000/unit/year), the assumption is made that the management of the Vacation Village would rent out these houses for four months of the year at \$500 per month. This would provide \$2,000 yearly, before management fees, to the owner of each house. It is envisaged that the majority of the owners of these houses would not occupy them for four months of the year; this would include some portion of both the summer and winter season.

Resort Hotel

The resort hotel is located near the village centre. The project profiles on Resort Hotels and Heritage Inns provide further information on this feature.

Golf Course

An 18- or 27-hole championship length course suitable for tournament play is included. The course would circulate through the development areas, linking residential with permanent open space. A club house with dining and snack facilities is provided as well as a Pro-shop. The dining snack facilities and Pro-shop would be operated on a lease basis and the rental provided would be utilized to maintain the facilities.

It is envisaged that, with a capital cost of \$500,000, the golf course will require a gross revenue in excess of \$150,000 per annum. If green fees were \$5 per day, more than 30,000 players per year would be required. This could be difficult to achieve in the short term and, as a result, it would be desirable to build the course in stages or have it used by the public.

Marina

A 100-slip marina is included near the village centre to accommodate both residents and guests. This marina incorporates facilities for lease and sale of boats, a restaurant and a snack bar. In addition, it will sell groceries, have storage facilities, rental and repair services. Each of these is foreseen to be operated by an independent businessman paying rent to the marina owner or to the vacation village. More information on marinas is found in the project profile on that subject.

ii) Rationale .

While the Vacation Village concept can encompass several business enterprises, such as vacation housing, resort hotel and boating facilities, it is the vacation housing component that is the most influential in terms of location, scale and character. Since a Vacation Village is a relatively new type of tourism/recreation facility, conventional measures of potential markets are not automatically applicable. The high density, extensive integrated recreational facilities and condominium ownership features that typify such developments result in a product and a market appeal that are different from traditional cottage subdivisions.

The major markets for vacation village development in Eastern Ontario are Toronto, Ottawa, and the adjacent areas of Quebec. Other parts of Ontario, Quebec and the nearby United States, offer supplementary potential. Present cottage ownership patterns, travel distances to vacation homes, growth prospects in the market areas, and cottage development at present all indicate a strong latent demand for a vacation village type of second home.

Two potential locations for Vacation Villages in the Trenton/Cornwall Zone are the Quinte and Thousand Islands Sub-zones. The Rideau Lakes area offers potential for a smaller version of approximately 500 units. Three such developments would involve a total of 2,900 units and, assuming staged development, the annual supply might be in the order of 200 to 500 units per year.

A survey conducted in 1968 indicated that 11% of Ontario households owned cottages². A more recent survey (1974) of selected urban markets in Ontario indicated that the incidence of vacation home ownership among higher income respondents increased to 16%. Thirteen percent of the non-owners in the higher income sample expressed interest in purchasing a vacation home. The majority of those are likely purchasers (by virtue of being in the higher income brackets) and they state that they will probably buy within the next five years. Most, however, will probably buy a lot and build their vacation home on it.

There are 16 urban centres in Southern Ontario from Hamilton to Cornwall (inclusive) that contain 7,000 or more households. They contain a total of 698,800 households, of which 365,000 had disposable incomes of \$10,000 or more in 1975. Assuming 13% are planning to buy a cottage over the next five years, this would mean that the major urban-centred market for rural cottages will be approximately 47,500 units, or 9,500 units per year.

Using the same approach as above and applying it to that portion of the Quebec market within about 175 miles from Gananoque, the annual market for cottages will be in the order of 9,000 units per year.

In relation to the market demand for seasonal homes, this level of Vacation Village housing development should be able to penetrate the market effectively. Among the most important market factors are:

- A total of 24,000 cottages in both Zones at present.
- A slowdown in cottage building permits in the area attributable in part to land availability and cost.
- An estimated potential market in Southern Ontario (urban centres between Hamilton and Cornwall) of 9,500 cottage units per year.
- An accessible Quebec market of 9,000 cottage units per year.

² Tourism Development in Ontario: A Framework for Opportunity, Appendices. Balmer, Crapo and Assoc. Inc., 1976, p. 107.

- A potential of 18,500 cottages per year from Ontario and Quebec alone.
- The additional demand by U.S. residents who now represent 14% of cottage ownership in Ontario appears to be falling off as a result of taxation policy.
- The success of several Vacation Village projects in various areas of Canada and the United States.
- Increasing travel distances from primary residence to cottage, now extending well beyond 150 miles.

At a construction rate of 200 - 300 units per year, Vacation Village developments would represent only some 1% of present cottage numbers and annual demand. This is a reasonable target, assuming that the product, price and other factors are competitive, and general economic conditions are favourable.

As noted in the concept, the Vacation Village would ideally have a large accessible land area to ensure room for the development and the associated recreation facilities as well as to maintain the natural environment around the site. Land areas in the order of 2,200 acres might be required. Access to Crown lands, other public lands, or the sharing of recreation facilities might reduce this land area requirement somewhat.

Convenient access to the facility is not crucial. Most users will either be residents of the development or on the basis of reservation, so a prominent location easily visible and accessible from major highways need not be critical.

The potential of the site as a year-round facility will necessitate certain additional services, such as snow clearance and garbage collection. Many of these could be arranged with the appropriate agency. The facility will be designed as a complete unit, however, the opportunity will no doubt exist for complementary and support facilities related to services on the site or tourist-oriented ventures adjacent to the site.

Strict environmental control will be required not only on the site, but also around the site, to ensure a long term opportunity. The site selected must be in the area of high landscape quality with an interesting environment. Environmental integrity of the development should be a primary design objective.

iii) Financial Profile

In the financial highlights in Table A-1, only the property development component has been shown, i.e., community centre, recreation centre, housing units, land and servicing. It is assumed that the other components will be financially viable as a part of the total project.

A Vacation Village is based on housing construction, real estate development and property management principles. As a result, this type of project is radically different from other tourism enterprises which involve more conventional services, industry financing and operating features.

The land and construction costs of the sample project are made up of the following elements:

- Land (including planning and related costs)..<	\$ 1,000,000
- Service and Recreation Centre.....	2,500,000
- Housing units (1175), and Servicing.....	<u>42,500,000</u>
TOTAL	<u><u>\$46,000.000</u></u>

It is assumed that the project would be developed over a period of ten years. The financing has been projected accordingly with consideration given to cash flow needs and sources over that period. The financing for each housing section would be arranged on a suitable basis providing for the recovery of land servicing costs as the units are sold and the transfer of unit financing to the owners.

The profit for the developer would be generated from the operation of the service and recreation centres and the construction of housing units. The former earnings are based on the estimation of adequate assessments and fees. The housing profit per unit of \$1700 is conservative with prospects for a higher return by an enterprising builder in the right circumstances. It must be kept in mind that such projects typically involve a large amount of debt financing and that the risk level can be substantial.

TABLE A-1

Investment, Income and Expense Highlights
Vacation Village
(1175 units)

Service and Recreation Centre

Revenue:

House service Assessment.....	\$1,175,000	
Commercial Leases & Other.....	<u>350,000</u>	
Total		\$1,525,000

Expenses:

Operating Cost of Village including Village Centre and Recreation Centre.....	\$1,000,000	
Administration Costs.....	<u>100,000</u>	
Total		\$1,100,000

Net Profit: \$ 425,000

INVESTMENT: \$2,500,000

RETURN: 17%

House Sales Program (117 units/year average over ten years)

Income:

Annual Sales of Units.....	\$4,950,000
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Expenses (annual):

Construction of Housing Units.....	\$4,250,000	
Promotion.....	150,000	
Sales Commission.....	250,000	
Administration Costs.....	<u>100,000</u>	
Total		\$4,750,000

Net Profit: \$ 200,000

INVESTMENT*: \$1,000,000

RETURN: 20%

* Limited to estimated original investment only. Housing construction costs considered as annual operating costs.

iv) Review of Potential Locations

1. Quinte Sub-zone

The Quinte Sub-zone has been coming under increasing pressure by second home purchasers particularly from the Toronto area market. The Sub-zone is just within weekend commuting distance. There exists a number of attractive sites on both the Bay of Quinte shoreline and the Lake Ontario shore. Access to water is crucial. A marine theme is also a high possibility for a Vacation Village. The area itself offers good recreation potential with natural recreation resources for boating, fishing and water sports in summer. Winter recreation opportunities may be restricted to cross country skiing, and indoor or covered facilities.

2. Thousand Islands Sub-zone

Again a shoreline facility is preferred. The area offers a unique landscape. The Village must be island-oriented although the main facility should be on the mainland.

3. Rideau Lakes

The facility suggested would be somewhat smaller primarily due to the problems associated with waste disposal. The area suggested has a high recreation potential. It has been coming under heavy pressure for cottaging, particularly as available shoreline becomes more limited. The Vacation Village would provide a more efficient use of this increasingly scarce resource.

v) Phasing

In view of the need to gain experience with this type of development for both the developer and government control agencies and to keep the supply of units in line with the earlier assessment of market demand, it is desirable that the Vacation Village proceed in no more than two of the three sites immediately, and that proposals be developed in an orderly manner over a construction period of ten to fifteen years.

2. DESTINATION RESORT

i) Concept

Destination resorts typically offer a broad range of recreational facilities as well as accommodation and food. Some destination resorts are sufficiently large or distinctive that they are promoted as a prime destination. Others are secondary destinations, the country or region having been the prime determinant.

Destination resorts typically involve capital investments of many million dollars. As a result, a powerful advertising and promotion program is required to generate adequate visitor traffic. Also, the market is sufficiently price competitive that good occupancy levels must be maintained to achieve an adequate level of profitability. These factors demand thorough and practical planning with particular attention to the location, market requirements and year-round utilization.

By virtue of their scale and their advertising, destination resorts form an important part of the tourism system in an area. Their linkages with the local economy in terms of employment and purchases can be significant. Also, they often spawn complementary or competitive facilities, thereby magnifying their impact.

The market for a destination resort is large and growing insofar as international tourism is concerned. An increasing percentage of Canadians and Americans are spending all or a portion of their vacation at a destination resort. Such resorts have become increasingly important for winter vacations either south in the United States, or the Caribbean, or Mexico or in northern areas offering high quality downhill skiing. Package tours and group air fares have greatly expanded the destination resort market from the more limited, high income segments of earlier years.

ii) Rationale

A destination resort may be developed in a number of ways. It can be a logical extension of existing traffic to the area or it can open up an entirely new area. There is no location in either of the Zones which has sufficient traffic presently to justify a destination resort as an immediate opportunity. Such a resort would require a sustained promotional effort and a facility of sufficient quality to compete with other international destination resorts. Many of these potentially competing facilities are located in unique natural settings such as Jasper, Aspen, Lake Louise. This natural setting assists in the promotion of the facility. Similar areas of dramatic scenic quality are lacking in the Eastern Ontario area. The area which most closely matches the scenic quality is located in the Madawaska Highlands. Tourism

in this Sub-zone is highly seasonal and heavily dependent upon downhill skiing. A destination resort would have to be phased on the basis of a detailed assessment of the market and the ability of the facility to attract an adequate portion of the market. The destination resort would have to be closely associated with other tourist facilities of the Sub-zone.

Such a facility would require that a site of several thousands of acres be available for ultimate development. Initial development might be smaller. Accessibility to the site, although not critical, should be convenient. The facility, if it is to grow, must be part of a larger system of support facilities which includes recreational as well as basic services. Strong environmental integrity of the site and its surroundings must be part of the development program to maintain and improve the natural setting.

iii) Financial Profile

A large scale destination resort, as set out here, has not been examined in detail, and no financial profile has been developed. Preliminary discussions indicate that a destination resort would require an investment of \$20-40 million. It is anticipated that both direct and indirect government involvement will likely be required for a project of this large a scale, if it is to be realized in the foreseeable future.

iv) Location

The importance of a strong natural resource base and access to large areas of rural lands dictate a location in the northern portion of the Sub-zone. Since downhill skiing is both unique to the Madawaska Highlands and an important winter activity, a location near downhill facilities will likely offer the most marketable site.

v) Phasing

Early development might be relatively small to provide the much needed accommodation for the existing and proposed ski facilities. Adequate area and scope for expansion should be a key criterion to any initial development proposal.

3. RESORT HOTEL

i) Concept

The resort hotel caters primarily to tourist traffic. The resort hotel must be designed to provide extended accommodation for visitors as opposed to the overnight accommodation needs of those travelling through the area. Emphasis would be placed upon food services and opportunities for recreation on a year round basis both within the hotel and in the immediate vicinity of the hotel.

A resort hotel may be the initial phase of a large complex including recreation oriented housing or a conference centre. It may be added to presently established facilities in order to provide the accommodation element for an area. The hotel should have access to a range of facilities representing a full year round program of activities.

ii) Rationale

A resort hotel must be well situated in relation to natural attractions, urban centres, and air and highway transport. The market feasibility of such projects is determined by their ability to capture an adequate volume of trade from some combination of summer destination vacationer; spring, fall and winter conference and seminar trade; and off-season weekend, day trip, and other business.

Resort hotels in the two Zones have five major markets on which to draw:

- Ottawa-Hull
- Eastern Ontario
- Toronto
- Montreal
- New York State.

Details on these markets are found in Appendix D. The principal potential locations in the Zones for new resort hotels are:

- Rideau Lakes
- Quinte
- Thousand Islands

All may have potential as part of a larger facility.

In terms of supply, a resort hotel of some 120 rooms, operating at an annual occupancy of 60%, would generate roughly 26,000 room nights. Of this total, roughly two-thirds are forecast to be sold during the summer (April-October season) for tourist and conference/convention trade. During the remainder of the year, conference/seminar and weekend recreation business would be the principal markets. Overall, Ontario weekend and vacation visitors and conferences/seminars are likely to provide the bulk of the business with U.S. visitors, a smaller segment.

In comparing this supply of 26,000 room nights against the potential market, the following factors were considered:

- a limited supply of modern resort hotel facilities at present, particularly in the Renfrew/Kingston Zone;
- a current total of approximately 580,000 visitor nights in hotels/motels/resorts/lodges in the two Zones which is equivalent to approximately 414,000 room nights;
- a demonstrated demand for the conference/seminar facilities in the general area, notably at established centres in Western Quebec, Ottawa and Kingston;
- an established conference/seminar demand in Kingston alone of 30,000 - 40,000 delegate days annually;
- the popularity of modern resort hotels in Western Quebec and the Muskokas;
- a projected additional 100,000 visitor nights by about 1982/3 which is equivalent to about 71,000 room nights which when added to the current room nights of 414,000 equals 485,000 room nights.

Therefore, a 120 room resort hotel would accommodate about 6% of the projected market. The project would have to rely on existing demand plus capturing a significant portion of the projected growth demand in both Zones.

These factors suggest that a resort hotel in the Rideau Lakes Sub-zone warrants detailed investigation by qualified tourist operators.

Support facilities and services are generally available throughout both Zones. These facilities and services are more readily available in or near urban centres. Rural sites will require careful consideration with regard to the provision of services.

(iii) Financial Profile

The resort hotel could range from 75 to 150 rooms. For purposes of this assessment, a 120-room unit has been selected. It would feature rooms, suites, dining facilities and recreation facilities, including tennis, swimming pools and saunas. The capital cost is estimated at \$3.5 million. At \$40.00 per room night and 60% occupancy, this hotel reflects a moderately profitable operation. Table A-2 presents investment, revenue and expense highlights.

iv) Location Review

The location of the resort hotel close to recreational facilities is critical. Such facilities as marinas, cross country skiing, sight seeing, fishing, hunting, swimming and tennis should be considered. The location should also be considered with the possibility of future development perhaps along the lines suggested in the Vacation Village profile and the Destination Resort profile.

Locations which should receive detailed review are:

- Rideau Lakes
- Quinte
- Thousand Islands

v) Phasing

Where this opportunity coincides with a larger facility, (Vacation Village or destination resort), phasing will be determined by the development program of the larger facility. It would be possible to phase the free standing resort hotel in response to market capture.

TABLE A-2

Investment, Income and Expense Highlights
120 Room Resort Hotel

<u>Investment</u>		
Land and Improvements	\$ 250,000	
Buildings, Furnishings, Fixtures and Equipment	<u>3,350,000</u>	
Total	<u>\$3,600,000</u>	
 <u>Revenue and Expenses</u>		
Revenue:		
Rooms	\$1,050,000	
Food	600,000	
Beverage	400,000	
Other	<u>50,000</u>	
Total		\$2,100,000
 Departmental Expenses:		
Room	\$ 295,000	
Food	480,000	
Beverage	220,000	
Other	<u>30,000</u>	
Total		<u>\$1,025,000</u>
Gross Operating Income		\$1,075,000
Overhead		<u>\$ 525,000</u>
Profit before Depreciation, Interest and Income Taxes		<u>\$ 550,000</u>
 <u>Return on Investment</u>		
Investment	\$3,600,000	
Net Profit before Depreciation, Interest and Income Tax	\$ 550,000	
Return	15%	

4. URBAN HOTEL/MOTOR HOTEL

i) Concept

Within the general category of urban hotel/motel, there can be a wide range of architectural concepts, design themes, price levels and services. At one extreme is the urban resort or convention hotel with several hundred rooms, conference halls of various sizes, a variety of food and beverage operations, recreation facilities, retail stores and other features in keeping with an overall theme of self-sufficiency and luxury. The other end of the scale is the conventional suburban motel offering 20 or 30 rooms, generally on a price basis. In between, there exists a wide variation in scale, facilities, quality and price appeal.

An urban hotel/motel is generally a tourist industry support operation meeting the accommodation needs of visitors: 1) who have been drawn to the area by one or more attractions; or, 2) who are en route to another destination. Some urban hotels do become destinations for conventions or meetings. Also, in a local market context, a particular facility may become a "destination" for dining or entertainment.

For the purposes of determining investment opportunities and formulating tourism strategies for this Study, it is useful to use a mid-range operation as a model. This is envisaged to have 150 rooms with food and beverage departments geared to the local resident market as well as hotel guests. See the "Heritage Inn" project for the profile of a smaller scale facility.

ii) Rationale and Location

An urban hotel in either Zone must serve three visitor markets to be successful: seasonal tourists; commercial travellers, and conference/seminars. The two locations that indicate potential for added urban hotel capacity are Kingston and Cornwall.

In the case of Kingston, the most important near term market factors favouring increased room capacity are:

- there presently exist 1,400 rooms in its accommodation sector. There are four hotels in Kingston with a total of 418 rooms that provide the prime accommodation. These hotels are reasonably competitive in price, relative to what they actually provide.
- a current demand for quality accommodation of some 110 - 120,000 room nights per year.
- an indicated above average occupancy rate at present.

- a growth in demand of 4-5% per year, up to about 150,000 room nights in five years;
- an established and growing volume of conference and seminar trade;
- good growth prospects for the local economy.

In view of the foregoing, a new facility of up to 200 rooms should be able to capture a reasonable share of the market. The 200 rooms, operating at an economic level, would represent some one-third of the forecast total room demand. It would have to capture some of the excess and turn-away demand, generate new trade, secure some competitive business, or some combination in the short term period.

The Cornwall situation is based on the City's plans for an expansion of its tourism and convention business, including plans for the development of the Civic Centre as a major Eastern Ontario convention/conference/seminar facility. The population (46,000), the regional economy, and transient traffic generate a moderate volume of tourist and commercial traffic at present. While high occupancy levels are experienced on occasion, the annual occupancy rate is not reported to be such that a major increase in capacity is warranted. However, the few better quality operations are reported to enjoy a good trade - one is proposing a 40-room expansion. Also there is limited availability of hotel rooms, particularly quality rooms near the Civic Centre.

iii) Financial Profile

Hotel occupancy rates are influenced by economic conditions, tourism patterns, marketing effectiveness and local competition. At the present time, both the general economy and tourism market are unfavourable with respect to the hotel industry. In many urban centres in Canada, occupancy rates for first class hotels are in the vicinity of 60 percent, far below the normal target of 65-70 percent for breakeven and profitability. Within the Zones, these factors plus competition from available local supply require a selective approach. With reference to the Kingston area, there is an emerging need for additional good quality rooms.

Room rates, reflecting the character and quality of the facility, competition and discounts are important considerations in the planning and operation of an urban hotel. In recent years, the concept of budget or economy facilities has emerged. Quality is maintained but rooms may be slightly smaller, amenities more limited and prices lower. Such operations are normally predicated on high year-round occupancy rates based on price appeal and high market potential.

The prevailing rate structure of other accommodation facilities in the area sets the stage for the overall rate strategy, another important factor since they are now being offered to a great many travellers. Corporate rates, tour operations, travel agent commissions, weekend specials and group rates for conventions all result in a reduction from the published schedule.

The food department typically involves a coffee shop and a dining room with the size and quality depending on the overall hotel environment and the local market. The menu must reflect these factors as well as its design and pricing.

The beverage department can vary considerably from the modest lounge geared primarily to guests to a large scale complex offering a mixture of facilities and entertainment. This aspect of the business is dependent largely on local market potential and competition.

Other revenue may be derived from gift, magazine, tobacco, and other merchandise sales; lease of space to retail, travel agency or other operations; and similar sources. This is highly dependent upon each operation although a basic convenience shop is common.

The expenses for an urban hotel normally are grouped into three categories; departmental, operating overheads and financial. The costs directly assignable to each department are clear. Industry percentage relationships to department revenue are well established, subject to variations for local cost differentials and the type of operation. Typically, departmental expenses amount to about half of the gross revenue. The operating overheads include administration and general expenses; advertising and promotion; heat, light and power; and, repairs and maintenance. The other expenses include depreciation, interest, property taxes, insurance and similar items.

To demonstrate the principal elements in determining the feasibility of an urban hotel, an example is presented in Table A-3. The importance of room occupancy and rates, food and beverage departments sales, departmental margins, control of overheads, depreciation policy, capital cost/revenue relationships, financial leverage and tax situation can be determined through the simple manipulation of the elements in this example. An occupancy of 75% and an average room rate of \$35 has been assumed.

TABLE A-3

Investment, Income and Expense Highlights
150 - Room Urban Hotel/Motel

Investment

Land and Improvements	\$ 350,000
Building, Furniture and Equipment	<u>6,400,000</u>
Total	<u>\$6,750,000</u>

Revenue and Expenses

Revenue:

Rooms	\$1,400,000
Food	700,000
Beverage	500,000
Other	<u>100,000</u>

\$2,700,000

Departmental Expenses:

Rooms	\$ 390,000
Food	525,000
Beverage	325,000
Other	<u>50,000</u>

\$1,290,000

Gross Operating Income

\$1,410,000

Overhead

\$ 550,000Profit before Depreciation, Interest and
Income Taxes\$ 860,000Return on Investment

Total Investment	\$6,750,000
Profit before Depreciation, Interest and Income Taxes	860,000
Return	13%

5. HERITAGE INN

i) Concept

Over the past 30 years, the most prevalent type of accommodation in suburban areas and smaller urban centres in Canada has been the motel or motor hotel. These facilities are commonly in the 30-50 unit range, generally owner-managed, with some chain or franchise involvement.

In these two Zones this pattern has prevailed. While functional in terms of accommodation and allied facilities, the design has generally had little local orientation. An emphasis on cost minimization with respect to design, construction, furnishings and fixtures has led to a conformist appearance for the most part.

In some areas of Canada, the United States and Europe, innovative design has been employed in the architecture, furnishings and fixtures of accommodation facilities providing greater interest and local identity. For example, a ranch motif has been used in some western operations and a colonial theme in parts of the Atlantic United States. The history, architecture and furniture traditions of Eastern Ontario offer the opportunity for a more creative approach to medium sized accommodation development. Not only could more interesting facilities be designed, but perhaps some historical buildings could be integrated as well. The production of furniture or crafts might be included in the overall design.

A Heritage Inn concept could be adopted on an individual basis by entrepreneurs in different communities or on a chain or franchise operation arrangement. Should the latter be achieved, a further benefit could be reservation system linkages.

ii) Rationale

The market rationale for the location of a Heritage Inn is basically commercial and transient room trade, an adequate local market for the food and beverage departments, and a moderate amount of summer tourist trade. Conference/seminar business could be important in some locations. The key feature of a Heritage Inn is not its economic character, but its design, materials and furnishings. Consequently, the tourist demand analysis aspect is less important than for most other project profiles; non-vacation trade is the key.

As the economy of the region expands and commercial visitor, conference and transient trade increases, there will be a demand for added new facilities to supplement or replace existing capacity in various locations. The analysis of this market is highly site specific.

The most important market indicators are:

- a 50-unit facility operating at 65% occupancy would generate 12,000 room nights. This should be compared with a forecast demand for room nights in the two Zones of about 485,000 (680,000 visitor nights divided by 1.4). Location and detailed market assessment will play a critical role in determining the actual feasibility in the Renfrew/Kingston Zone.
- since the facility is primarily dependent upon transient traffic, existing traffic volumes by major highways provide an indication of sites and areas easily accessible to heavily travelled routes. Tables C-12 and C-25 in Appendix C indicate the ranking of heavily travelled highways in the Trenton/Cornwall and Renfrew/Kingston Zones respectively. From these tables, the importance of Kingston, Brockville, Belleville, Perth, Smiths Falls, Carleton Place and Arnprior as transportation modes can be seen.
- the major importance for the tourism industry is the heritage design and a location near the tourism focal points.
- general proximity to urban areas will assist in the facility's ability to attract adequate customers for the food and beverage departments, as well as conference traffic. Key major urban centres in this regard are Ottawa-Hull and Kingston.

iii) Financial Profile

The factors applicable to an urban hotel are equally significant for a Heritage Inn. The more limited local market and transient traffic in smaller communities make such operations more vulnerable in terms of the various revenue sources. On the other hand, owner management is likely to provide closer cost control and lower management costs if economies are necessary.

The model used (Table A-4) is based on a 50 unit plant geared to tourist (including commercial) patronage. Modest food and beverage facilities have been assumed, geared primarily to the needs of the guests. To achieve greater profitability, larger food and beverage departments would likely be provided, depending on local circumstances. An economical, owner-managed facility is assumed for this type of facility with close control over capital, operating and overhead costs.

TABLE A-4

Investment, Income and Expense Highlights
50-Unit Heritage Inn

Investment

Land and Improvements	\$ 100,000
Buildings, Equipment and Furnishings	<u>1,000,000</u>
Total	<u><u>\$1,100,000</u></u>

Revenue and Expenses

Revenue:

Rooms	\$ 330,000
Food and Beverage	35,000
Other	<u>20,000</u>

Total		\$385,000
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Departmental Expenses:

Rooms	\$ 100,000
Food and Beverage	30,000
Other	<u>15,000</u>

	<u>\$145,000</u>
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Gross Operating Income	\$240,000
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Overhead	<u>\$ 90,000</u>
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Profit before Depreciation, Interest and Income Taxes	<u><u>\$150,000</u></u>
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Return on Investment

Total Investment	\$1,100,000
Net Profit before Depreciation, Interest and Income Taxes	\$ 150,000
Return	14%

iv) Locations

Within the Zone, Heritage Inns could be considered for many of the urban centres at a time when the present capacity requires replacement, major renovation or expansion. Probable locations for consideration in the first five years would be the Kingston, Belleville, Brockville, Prescott and Cornwall areas in the Trenton/Cornwall Zone, and Perth, Smiths Falls, Carleton Place, Arnprior and Pembroke in the Renfrew/Kingston Zone. Each facility represents a major increase in supply, thus all locations cannot proceed at once.

In selecting a location, reference should be made to traffic volume. Tables C-12 and C-25 of Appendix C provide an indication of the major traffic routes in the Zones. These routes, in order of traffic volume are: 33, 401, 7, 17, 29, 37 and 15. The intersection of these routes at such centres as Kingston, Carleton Place and Smiths Falls, are high volume routes and have potential as accommodation locations.

6. LARGE COMMERCIAL ATTRACTION

i) Concept

Man-made attractions have become increasingly important features of the North American tourist industry over the last 20 years. Substantial investments may be involved. Ontario Place in Toronto, and La Ronde in Montreal, are the two principal examples in Canada. Other major attractions are: Busch Gardens, Tampa, Florida; African Lion Safari, Rockton, Ontario, and Hemmingford, Quebec; marine exhibits: Marineland and Game Farm, Niagara Falls; Marineland of the Pacific; historical restoration of facilities: Old Fort Henry, Kingston; Upper Canada Village, Morrisburg; Williamsburg, Virginia; and scientific or educational expositions: Ontario Science Centre, Toronto; Chicago Museum of Science and Industry, Chicago; National Museum of Science and Technology, Ottawa.

With the exception of Disney World near Orlando, Florida, these facilities probably do not fall in the category of "Destination Attractions"; rather, they form either part of the overall tourist package that creates the area's appeal, or they are secondary attractions designed to capitalize on and enhance an established pattern of tourist traffic. While major commercial attractions are commonly dependent to a significant degree on visitors to the area, the experience of most operations is that a majority of their business is developed from local residents. Thus, day-trippers, who normally live within 50 miles of the site, are the key to ensuring a basic volume of traffic (and cash inflow). This characteristic is applicable particularly to the straight amusement type park.

Other significant features of major commercial attractions are the importance of repeat visitors (suggesting the importance of high quality, good value, changing displays and access to a large continuing market) and a mixed revenue base (entertainment, food, souvenirs, etc.). Some of the projects cited earlier are run by government. This aspect of major attractions points out the need to distinguish between what is private-commercial and what is government commercial, even though the basic idea may be sound in terms of demand or local tourism need.

A number of major commercial attractions in the United States have experienced financial difficulty, even some of the most innovative and apparently best planned and located. As a result, there is a need for thorough planning of major attractions and a careful regard for the hard realities of the businesses. The lessons of experience - failures as well as successes - can provide valuable guidelines for proposed new attractions.

ii) Rationale

A commercial attraction normally derives its traffic from two principal sources: day-trippers within a one or two hour drive; and transient or destination vacationers. An examination of the market data (Appendix D), indicates the St. Lawrence Valley Sub-zone as the principal near-term location for an attraction. Access to major markets and lack of competition are the chief considerations. In the longer term, Kingston/Wolfe Island may offer possibilities because of the unique features offered by Wolfe Island, even though the immediate resident population is relatively low.

A detailed assessment of a major tourist attraction based on the square timber era in Renfrew County (Timbertown) has been prepared for the Ministry. It indicates a potential for an investment of \$8-10 million.

With reference to the St. Lawrence Valley Sub-zone, some of the key market data are as follows:

- a day/weekend target population of some 9 million people:
 - 450,000 within 50 miles;
 - 4,300,000 between 50 and 100 miles;
 - 4,100,000 between 100 and 175 miles;totalling about 8.8 million.
- the projected growth of this population to almost 10 million by 1986.
- tourism traffic to the Trenton/Cornwall Zone of approximately 72 million visitor trips annually.
- some 950,000 social, recreational and personal trips to the St. Lawrence Valley by Montreal and area residents annually in 1974; forecast to reach 1.8 million by 1991.
- major historical attractions in the zone generating visitors of up to 350,000 annually.
- a limited supply of tourist attractions in the St. Lawrence Valley.
- excellent highway access from Toronto, Montreal, Ottawa and the United States.
- established tourist circulation patterns through and past this area of the Zone.

In view of the foregoing, a well-planned, large attraction in the St. Lawrence Valley Sub-zone should have good prospects to attract 200,000 to 300,000 visitors per year. This represents a modest proportion of the total market and is consistent with the record of established major attractions in the Zone, such as Upper Canada Village.

iii) Financial Profile

A large commercial attraction must be planned in accordance with the market potential of local residents (day-tripping tourists) and visitors to the area.

With respect to a St. Lawrence Valley location, a target of 200,000-300,000 visitors per year appears readily attainable for a well conceived, planned and managed operation. Half of the volume is foreseen to come from the Montreal region and the balance from the rest of Eastern Ontario, the United States and elsewhere. Annual revenue might approximate \$1 million which could justify a capital investment of roughly twice that level. A general indication of the economics of a limited scale theme park type of attraction is shown in Table A-5.

Note

For detailed financial assessment of the Timbertown proposal, refer to "Renfrew County Visitor Attraction Study" prepared for the Ministry of Industry and Tourism and the Ministry of Treasury, Economics and Intergovernmental Affairs of the Province of Ontario, March 1976.

TABLE A-5

Investment, Income and Expense Highlights
Large Commercial, Amusement Type Attraction

Investment

Land and Improvements	\$ 500,000
Buildings, Displays & Equipment	<u>3,000,000</u>
Total	<u>\$3,500,000</u>

Revenue and Expenses

Revenue:

Admissions	\$1,050,000
Food Sales	450,000
Souvenirs	300,000
Other	<u>50,000</u>

Total		\$1,850,000
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Expenses:

Salaries and Wages	\$ 550,000
Cost of Food & Merchandise	300,000
Other	<u>330,000</u>

Total		<u>\$1,180,000</u>
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Net Profit Before Depreciation,
Interest and Income Taxes

	\$ 670,000
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Return on Investment

Total Investment	\$3,500,000
Net Profit before Depreciation, Interest and Income Tax	\$ 670,000
Return	19%

iv) Location

St. Lawrence Valley

As noted earlier, this Sub-zone offers the best market situation for a major commercial attraction of the type outlined above. A number of possible projects are outlined in Appendix B. The attraction might be developed as a single entity or as a closely integrated complex of smaller units.

Kingston/Wolfe Island

This is a longer term opportunity which will require a build up in market in order to justify a major investment. The project if located on Wolfe Island, must account for the unique island situation in relation to a major urban centre.

7. SMALL COMMERCIAL ATTRACTION

i) Concept

In contrast to theme park and similar large scale projects that involve several million dollars in capital investment and several hundred thousand visitors annually, a small commercial attraction has much more limited capital investment and traffic requirements. Such operations can be established singly or in clusters, depending on the situation, the latter generally being preferable. As small business enterprises, such attractions offer the benefits of close owner/manager involvement, cost control and supervision, low overhead and personal interest in the operation. Small attractions are normally seasonal with a typical operating year extending from mid-June to late September (with weekend operations common in the early and late season.)

In many tourist areas, small attractions are the backbone of the tourism plant, for example, Prince Edward Island. Such operations typically reflect themes of the area; e.g., a hobby or craft; sports; e.g., golf driving ranges; or, the interests of a special visitor group; e.g., children's playground or amusement park. Some specific examples are Rainbow Valley (Lucy Maude Montgomery), Woodleigh Replicas, P.E.I.; and, Hockey Hall of Fame, Kingston.

Like their larger scale counterparts, small attractions typically depend on local residents for a significant amount of their trade. However, the smaller revenue requirements enable them to be more "footloose"; a location away from an urban centre may become possible.

Commercial attractions fall within an investment spectrum with no particular dividing point between large or small. However, the market and economic conditions in the two Zones under study indicate that a capital expenditure figure of \$500,000 might be used as an arbitrary basis for differentiation. As far as visitor volumes for a small attraction, they may be 25,000 to 100,000 or more, depending on the type and visitor spending pattern.

ii) Rationale

A small commercial attraction, like its large counterpart, normally has two markets on which to draw: "day-trippers" residing within an easy one or two-hour drive; and, transient or destination vacationers. A preliminary market analysis of

the Renfrew/Kingston and Trenton/Cornwall Zones indicates several potential locations for modest projects with visitor volumes in the range of 25,000 to 100,000 annually.

The key demand/supply considerations for those locations which have the most promise are:

- Kingston/Wolfe Island -- the population within one to two hour drive (approx. 75 miles) of Kingston is estimated at 460,000. This figure is projected to grow to 510,000 by 1986. Visits to the area are currently estimated at 7.6 million persons annually. On the supply side, Old Fort Henry is a major attraction which draws well and several existing small operations in the Kingston/Gananoque area are reportedly well patronized. For example, the boat tours in Gananoque are reported to attract well in excess of 200,000 visitors per year. One or more small attractions should be able to capture 25,000 visitors or more.
- Rideau Lakes -- A well-situated attraction in the Rideau Lakes area would have a base market of some 1.2 million people within a one to two-hour drive which would, dependent upon penetration rates, be sufficient to support a moderately sized attraction. In addition, travel to the area is estimated at 5 million persons annually. There are few commercial attractions now in operation.
 - Carleton Place/Almonte -- This location offers close proximity to the Ottawa-Hull market of more than 500,000 residents. Visitor trips to the National Capital Region, many of them families with small children, total 27 million annually. These markets, especially allowing for repeat business from Ottawa-Hull residents, provide a good basis for one or two modest attractions. A further location factor is the highway traffic through the area which, on a summer average, is 8,700 vehicles eastbound and 5,600 vehicles westbound per day on Highway 7. There are a few small attractions now in the general vicinity of Ottawa-Carleton; the community contacts program indicate them to be successful. The potential for expansion and clustering around the significant traffic routes should be investigated.

- Quinte -- The base market within one-hour drive of the Quinte area is some 220,000 people which appears very low; however, the one to two hour range raises this number to 3 million (including Metro Toronto, Kingston and Peterborough). Tourist traffic to the area is strong in the summer with cottagers, campers, house guests and transients - all important components. Rough estimates place the volume of annual visitors at 9 million persons. There are no significant commercial attractions in the area at present and new attractions appear somewhat marginal subject to detailed market assessment.
- Thousand Islands -- The "day-tripping" market (two-hour distance) potential for a small attraction in the Thousand Islands area is estimated at more than 750,000. Supplementary tourist markets up to the limit for weekend visitors amount to more than 12 million people. At present, summer tourists to the area are estimated to exceed 3 million annually. There are several well-patronized attractions in the area at present, notably boat tours. These market indicators suggest that the prospects for a well-designed and located facility are favourable.
- St. Lawrence Valley -- The Cornwall-Morrisburg area offers good potential for small attractions. But the location in relation to tourist traffic patterns and established facilities, such as Upper Canada Village, would be important. A portion of Guindon Park in Cornwall has been set aside for a commercial attraction. As part of this larger recreational complex, a small facility could be well situated for local and visitor traffic. The market factors described for the large commercial attraction in the St. Lawrence Valley Sub-zone are applicable to this project, as well, recognizing the lesser drawing power of this more modest project. Careful consideration must be given to the timing of the small attraction in relation to a large commercial attraction and overall tourism development in the area.

iii) Financial Profile

Revenue for a small attraction is typically generated from three sources: admission or attraction charge; food and souvenirs. The most important is the admission or attraction charge. For a spectator-type of attraction, this is established according to a price schedule with a differential for adults and children and sometimes other groups as well; e.g., senior citizen

or school groups. Some amusement parks charge a single fee for all facilities; others have an admission charge plus ride fees; still others charge only on a per ride or attraction basis. At present, there is a wide range of prices and fee policies for attractions in the zone reflecting differences in cost, appeal, duration and market.

Food and souvenir revenue is normally a secondary but important source of profit contribution. The potential varies with the type of facility and nearby competition.

Labour and depreciation are the two principal cost items, the balance varying with the type of attraction. Experience indicates that a small attraction can employ roughly five to ten people; the capital investment can vary substantially in relation to the same level of staff. However, a range of \$200,000 to \$500,000 is typical.

Financial highlights for a small commercial attraction are shown in Table A-6. This is based on a children's recreation type of attraction with displays plus simple rides.

iv) Location

The Sub-zones with potential were reviewed above. Specific theming for attractions is indicated in the main report and in Appendix B.

v) Phasing and Development

With projects of this magnitude the interrelationship between Sub-zones and between individual projects must be reviewed when specific proposals are being considered. The potential for attractions in the general locations suggested should be maintained; however, phasing of development may be required if two or more proposals are to be entertained in any one Sub-zone. Clustering of attractions should promote co-ordinated development.

TABLE A-6

Investment, Income and Expense Highlights
Small Commercial Attraction

Investment

Land and Improvements	\$ 35,000
Buildings, Displays & Equipment	<u>240,000</u>
Total	<u>\$275,000</u>

Revenue and Expenses

Revenue:

Admissions	\$ 75,000
Food	25,000
Souvenirs	25,000
Other	<u>5,000</u>

Total \$130,000

Expenses:

Wages and Salaries	\$ 35,000
Cost of Food and Souvenirs	30,000
Other (Utilities, Maintenance, Advertising, Insurance, Etc.)	<u>30,000</u>

Total \$ 95,000

Net Profit before Depreciation, Interest
and Income Taxes

\$ 35,000

Return on Investment

Total Investment	\$275,000
Net Profit before Depreciation, Income Tax and Interest	\$ 35,000
Return	13%

8. COMMERCIAL CAMPGROUND

i) Concept

The surge in the popularity of camping over the past ten years has been manifested in not only more sophisticated and costly camping equipment, such as truck campers and motor homes, but also an increase in the number, scale and quality of campgrounds. While some campers still prefer a wilderness type of experience, many more seek well planned facilities offering extensive services. Some campgrounds are geared to transient tourists who plan to spend only a few nights whereas others serve seasonal campers who, in effect, use their tent or trailer as a cottage substitute.

Attention has been given to the opportunities for large campground complexes. These facilities are foreseen to consist of a minimum of 85 and possibly in excess of 100 sites. The normal central services, such as laundry, grocery store, recreation room, playground, swimming pool would be included. In addition, it is envisaged that the campground would be integrated with one or more commercial attractions (small or large), a marina, a Vacation Village or some combination.

A commercial campground complex is foreseen to serve as an alternative to cottage ownership, substituting the same potential for a cottage experience without the attendant high investment and maintenance costs. This type of facility could operate as a low cost destination resort if linked with an attraction and recreation. If a project is of a sufficient scale, it can be promoted extensively, thus helping to strengthen the image of the Zone or an area within the Zone.

ii) Rationale

At present there are an estimated 127 campgrounds - public and private - in the Trenton/Cornwall Zone, and 163 campgrounds - public and private - in the Renfrew/Kingston Zone. Average occupancy levels for Eastern Ontario campgrounds are low, being in the 35% range.

However, some facilities in preferred locations are essentially full during the prime six to eight week season. The use of a three month base for determining occupancy disguises this 'at capacity' condition for the prime season. A number of facilities, particularly some of the private operations in poorer locations, operate at less than capacity even during the prime season.

Campground complexes might be located in all of the Sub-zones. Location is a key factor, hence the facilities should be geared to serving as a cottage substitute for the Toronto, Kingston, Ottawa/Hull and Montreal markets, or a destination site for visitors from other market areas and/or as a stopping point for one or two nights for transient visitors.

The specific site must be chosen carefully with full recognition being given to the relative merits of proximity to a natural or man-made attraction as opposed to convenient access to a major highway. A further dimension is an attractive, practical site (in terms of drainage water and similar features). All areas in the Zone have a number of sites which as a result of market and supply factors would be well suited for campgrounds in the future.

The market considerations are:

- there were approximately 675,000 camping party nights in the Trenton/Cornwall Zone and 470,000 camping party nights in the Renfrew/Kingston Zone in 1974-5. This demand appears to be growing.
- a campground of 100 sites operating at 35% capacity for 3 months would accommodate 3,150 camping party nights, or between $\frac{1}{2}$ to 1% of present camping activity.
- many campgrounds, particularly privately owned ones, are becoming more specialized, i.e., catering to families and year-round leasing of campsites.
- location and site considerations are important to a successful establishment and operation of a campground.
- any new campground operations should be considered only on the basis of an in-depth assessment of highly localized demand/supply conditions.
- returns for campground operations are generally low. Many operators felt that fees have generally been maintained at artificially low levels due to the heavy involvement of government agencies. Recent indications suggest a future rise in government camping fees. The effect of rising fees on the market is not known at present. Although demand is growing for campgrounds of various types, low profitability and quality of facility is discouraging new operations.

iii) Financial Profile

Campgrounds are more seriously affected by seasonality than many other tourist facilities as a result of temperature and the family/summer holiday nature of the market. As a result, there is a need for careful attention to capital costs, revenue maximization and expense control.

The capital required for campgrounds is highly dependent on the location and the target market to be served. Professional managers in the business use a guideline of \$25 in capital investment per site per camp night, based on a season of 75 days from late June to mid-September. Roughly 90-100% of the campground's revenue is generated during July and August. On this basis, an 85 site campground would involve a capital outlay of about \$160,000 including land. Such a facility would incorporate a central services building, a laundry, a grocery store, a recreation room, a swimming pool, all utilities and hookups, sewage treatment and landscaping. A children's playground is mandatory. The feasibility of ancillary operations such as a restaurant or a small commercial attraction should be assessed as separate business units.

There are three principal sources of revenue for a campground: registration; grocery and other merchandise sales; and, vending machines and other services. Well managed, large scale operations endeavour to secure a balanced dollar volume from these three sources.

The principal expense items are merchandise, salaries and wages, and utilities. Campgrounds are generally family operations for reasons of cost control and flexibility of labour use. Labour is a major problem for campground owners because of availability or cost or both.

Advertising and promotion are essential costs of operating a campground. Billboards must be placed along the routes to the campsite and advertising must be placed in travel magazines in order to create the volume that is necessary. The cost of advertising can run as high as \$3,000 to \$4,000 in the early years of operation. However, it normally averages out in the third and fourth year to about \$1,000 per year. Participation in a franchise operation is another form of advertising which can often be highly effective.

Financial data for a hypothetical 85-site campground which has been in operation for at least three years is shown in Table A-7. The data is predicated on the campground operating 108 days, but with the bulk of the business concentrated in 75 days (using a rate of \$5.00 and 90%). Market information indicates that the ability to generate this level of income is limited by competition including government operated campgrounds. Consequently, a commercial campground is probably not an "immediate" opportunity.

TABLE A-7

Investment, Income and Expense Highlights
85-Site Commercial Campground

Investment

Land and Improvements	\$ 10,000
Buildings, Furnishings and Equipment	<u>150,000</u>
Total	<u>\$160,000</u>

Revenue and Expenses

Revenue:

Registration	\$ 30,000
Merchandise Sales	30,000
Vending Machines and Other	<u>10,000</u>

Total		\$70,000
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Expenses:

Wages and Salaries	\$ 15,000
Cost of Merchandise	26,000
Other (Utilities, Maintenance Advertising, Insurance, Etc.)	<u>15,000</u>

Total		<u>\$56,000</u>
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Net Profit before Depreciation, Interest and Income Taxes		<u>\$14,000</u>
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Return on Investment

Total Investment	\$160,000
Net Profit before Depreciation, Income Tax & Interest	14,000
Return	9%

9. MARINA/MARINE TOURING COMPLEX

i) Concept

There is an increase in touring by power and sailboat. There are strong indications that this facet of tourism will show exceptional increase over the next few years. To date, local marinas have accommodated transient traffic insofar as basic services such as fuel and pumpouts. However, such trade has been a minor part of the revenue base in Ontario. Marine touring complexes have existed in the U.S. for many years. Some examples are found on the U.S. side of the St. Lawrence River in Alexandria Bay and Clayton, N.Y. These complexes offer boat motel and other accommodation, full marina services plus food, beverage and entertainment.

Marinas are not shown as an immediate opportunity because of the general level of profitability in the industry, rising energy costs, adverse economic conditions and the complex government approvals process.

ii) Rationale

The facilities will have to be designed on a highly specific basis to meet the unique needs of each location. In some cases, this might involve a conventional marina with adequate but minimal fuel, supply, pumpout and other facilities for touring boaters; the other extreme might involve an integrated marina, hotel/resort, campground and attraction complex.

Marinas must also be considered carefully since their financial record is marginal, except in some urban areas or rural locations with sound off-season operation. The market for marinas is basically local - either year round residents or cottagers. An analysis of local recreational boating patterns - present and projected (including Vacation Village developments), is needed to determine those individual communities that might require new or expanded marina capacity. From the point of view of significant new tourist dollars for an area, the principal markets would be transient boaters and vacationers with boats requiring launching, fuel and similar services.

The main transient boating routes in the Zones are the Trent-Severn, Rideau and St. Lawrence systems. An estimated 22,000 boats use the Trent-Severn system annually; some 8% are from the United States. Rideau system traffic amounts to 8,000 boats annually, one-third of which are American. From a tourism development point of view, it is desirable that the planning of local marinas provide for appropriate services for transients and the promotion of this facet of the industry. However, the investment decisions must be made on the basis of local markets.

iii) Financial Profile

Modern marinas must provide a number of services. Typically, these include:

- repair service and maintenance
- fuel, berths and moorings, etc.
- storage
- hardware, accessories, gifts, clothing and supplies
- new boat sales
- boat rentals
- used equipment sales
- new motor sales
- other equipment sales

The capital cost for a marina today is in the region of from \$300,000 to \$500,000., excluding major site works. Commonly, this would be a 100 slip marina operating for 163 days. Occupancy of 100% should be reached in the third year. The breakdown of typical revenues and costs associated with such a marina are shown in Table A-8.

In view of the marginal nature of the marina business, except in a few high potential locations, generally found near major urban centres, it will be necessary to develop marinas in conjunction with government subsidized breakwater facilities or as part of a larger complex with more profitable sources of revenue or both.

iv) Location

Marine touring facilities should be located at intervals appropriate for roughly one day of travel. While this will vary depending on the power, motor versus wind, and the nature of the area, for example, the tourist attractions and navigational factors, an average distance of 50 miles between facilities appears appropriate in view of present boating patterns.

In the Trenton/Cornwall Zone, the St. Lawrence River and Lake Ontario are the two principal water bodies meriting consideration for the establishment of marine touring facilities. Many urban centres fronting upon these waterways have proposals for waterfront development/redevelopment which may include marinas. Each of these proposals has individual merits. Those which meet the following criteria should be promoted:

- clustering of uses, particularly those catering to the tourist;
- will not reduce or preclude other opportunities identified in this report;
- enhance the concept of touring;
- are highly visible, and enhance the area.

TABLE A-8

Investment, Income and Expense Highlights100 Slip MarinaInvestments

Land and Improvements	\$ 30,000
Buildings, Docks and Equipment	270,000
Boats	<u>50,000</u>
Total	<u>\$350,000</u>

Revenue and Expenses

Revenue:

Boat and Engine Sales	\$100,000
Parts, Accessories & Service	150,000
Slips and Storage	50,000
Fuel and Other	<u>35,000</u>
Total	\$335,000

Expenses:

Wages and Salaries	\$ 60,000
Merchandise and Materials	200,000
Other	<u>50,000</u>
Total	<u>\$310,000</u>

Profit before Depreciation, Interest & Income Taxes \$ 25,000

Return on Investment

Total Investment	\$350,000
Net Profit before Depreciation, Income Tax and Interest	25,000
Return	7%

10. CRUISE SHIP

In view of the increased popularity of cruise vacations and noting the increased number of cruises being offered and promoted both in the Carribean and the Mediterranean, as well as on the U.S. West Coast, British Columbia, Alaska, on the Great Lakes, and from Montreal and Halifax, the idea of a cruise ship operating out of Kingston has been assessed in detail. Simple project economies indicate a potentially profitable opportunity, however, other factors suggest that the cruise ship need not necessarily be established in this Zone. These factors are:

1. The principal supporting market for this project would be in Toronto and Montreal. Both of these areas are capable of supporting a cruise ship from their own ports. Therefore, a cruise ship located in Kingston would either encounter strong competition from other cruise ships which could erode its market and/or the Kingston base might eventually find it more economic to relocate to the Toronto or Montreal areas.
2. Indications from recently established Canadian cruise ships indicate some unexpected financial and regulatory difficulties which may affect the earlier economic assessment.
3. The economic benefits in the Zone would be limited particularly in comparison to other possible investments.

For these reasons this project is not classified as an immediate opportunity. The possibility of establishing Kingston as well as other cities in the Zone as ports of call for cruise ships in the Great Lakes is very real and should be incorporated in any shore line development.

APPENDIX B
IDEAS LIST -- POTENTIAL PROJECTS

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APPENDIX B

IDEAS LIST -- Potential Projects

The following list has been prepared as a result of ideas obtained through the demand and supply analysis, the community contacts program, discussions with Ministry officials and a series of brain storming sessions held with Ministry staff. This list cannot be considered complete but should be used as a library of ideas which may be assessed in various situations and locations throughout the Zones.

A. TRENTON/CORNWALL

<u>Sub-zones</u>	<u>Idea</u>	<u>Project</u>
1. Quinte	Marine -power -sail	Year Round resort & convention centre
		Sailing School
		Wellington Harbour - marina
		Marina/Attractions/Accommodation
	Arts & Culture	Summer Theatre
		Participation Attraction (tire children out)
	1930's	Vacation Village
	Farm Vacation/ bed & breakfast	
	Information	Brighton Interchange Gateway to Prince Edward County
	Racing	Boat - hydrofoils - sail
		Car - Grand Prix - Rally
	Pre-Confederation UEL (United Empire Loyalists) Pre UEL - French/ Indian	Small Attractions coordinated - common theme - clustered Theme Park
	Aviation (Trenton)	Air Museum

<u>Sub-Zones</u>	<u>Idea</u>	<u>Project</u>
Quinte (con't)	Cheese (Belleville)	Cheese Attraction (Black Diamond)
	Future Life Style Technology Napanee	Transport Technology Attraction
		Theme Park
		Transportation
		Solar Energy Energy Alternatives
2. Kingston/ Wolfe Island	Maritime History	"Under canvas" Cruise Boats
	Marine Touring - power - sail	Mini paddle wheelers steam powered
		Olympic site destination marina
		Urban Hotel
	Historic/Heritage	Urban Theme Park Participation Attraction (Historic/Old Fort Henry)
	Future Technology	Major Attraction (futuristic)
		Sailing School - Advanced - Beginners

<u>Sub-zones</u>	<u>Idea</u>	<u>Project</u>
2. Kingston/ Wolfe Island (Con't)	Criminology/Justice/ Corrections	Criminology Centre - Museum
		Criminal Justice Training Centre
	War Theme	Theme History
		Shopping/Attraction Complex
	French History Pre-Confederation	Movie Studio Day - Visitor Attraction Evening - Movie Set
		Battlefield Attraction - Participation(?)
	Transportation History	Fort Frontenac
		Steam Train Excursion
	Cultural	Theatre/Music (Festival Canada)
		Conference Centre
3. Thousand Islands	Natural Resource	Multicultural Theme Park - Scottish, Irish, Italian, etc.
		- Immigration Centre
		Destination Resort (Natural Theme)
		Hotel School
		Campgrounds (High Quality/ Controlled)
		Small Attractions
		Underwater Park - Scuba Divers

<u>Subzones</u>	<u>Idea</u>	<u>Project</u>
3. Thousand Islands (Con't)	Natural Resource	Game Reserve - Hunting - Photography - Naturalists
		Vacation Village
		Domed Resort - Golf Course
	Marine	Houseboat Rentals
		Floating Hotels/ Houseboats Towed
		Cruise Ship
		Glass Bottom Boats
		Glass Sided Boats
		Ferry/Tour
		Peace Centre/ University/College
		Boldt Castle Development
	Cultural/ Recreation	Mini-Ontario Mini-Canada
	French Theme	Accommodation - Clusters
4. St. Lawrence Valley	Accommodation Service Centre	Hotel/Motel near intersection of Hwy 416/401
	Immigration Centre (Prescott)	North American Zoo
	Marine (Prescott)	Bateau Race
		Marina
		Marine Museum

<u>Sub-zones</u>	<u>Idea</u>	<u>Project</u>
4. St. Lawrence Valley (Con't)	Heritage (Prescott)	Highway #2 - Heritage Route
	Military	Fort Wellington/Edwardsburgh
	Historic (Morrisburg)	- Theme Accommodation - Williamsburg Type of Attraction (Animated/Participative)
	Apple Growing (Morrisburg)	- Wine Making - Cider - Historic MacIntosh Apple
	Miscellaneous	Confederation Theme Park Golf Course "under dome" Glass Bottom Boat Craft School - off season Summer Theatre Equestrian Centre Race Track Dairy Interpretation Centre - Chain of Cheese Shops such as Balderson Cheese - Tours of Cheese Making - Combine with Wine
	Marina (Cornwall)	Complex
	Man-Made Attractions (Cornwall)	Foot Bridge over St. Lawrence C.N. Tower/Skylon Mini Seaway Ride
	French Theme (Cornwall)	Events/Accommodation

B. RENFREW/KINGSTON

<u>Subzones</u>	<u>Idea</u>	<u>Project</u>
1. Kingston/ Wolfe Island	(see Trenton/Cornwall above)	
2. Rideau Lakes	Cottaging/Cottaging Substitutes (Rideau Lakes)	Vacation Village Destination Resort
	Marine	Tour boat, Ferry Boat linked to bus trip Westport, Smiths Falls, Kars
	Heritage	Perth (Central Business District) <ul style="list-style-type: none"> - shopping - walking tours - small urban theme park Smiths Falls/Merrickville <ul style="list-style-type: none"> - restoration of buildings - related to commercial attractions - specialty shopping activities
	Crafts	Elgin area <ul style="list-style-type: none"> - flea market - accommodation - commercial outlets - special craft schools
	Small Attractions	<ul style="list-style-type: none"> - clustered-themed - around urban areas or tourist centres
	Cottage Substitute	Vacation Village -
	Accommodation (Rideau)	Exclusive accommodation Housekeeping units Shelters on trails with limited access Quality campground/attractions
	Urban (Perth)	Urban theme - heritage/walking tour <ul style="list-style-type: none"> - shopping/outfitting Improved accommodation Smaller information centre

	<u>Subzones</u>	<u>Idea</u>	<u>Project</u>
3.	Carleton Place/ Almonte	Entry Focal Point	Campground - cluster of attractions Information area for Ottawa-Carleton Zone Diversion point north or south Carleton Place - accommodation/food
4.	Ottawa River Valley	Winter Experience	Winter camping Cross country skiing
		Marine	White water experience - Ottawa River
		Attractions - crafts heritage theme	Small children's attraction (Arnprior)
		Renfrew/Arnprior Service Centre	Campground/attractions Urban facilities Accommodation - Arnprior
5.	Madawaska Highlands	Canoeing	Access to Crown lands Canoeing
		Natural Environment	Destination Resort - exclusive - white linen - clean bedsheets in the wilderness i.e. Montebello
		Skiing	Destination Resort (Calabogie) Improved ski hills Summer use of ski hills
		Marine	White water experience - Madawaska Boating and fishing - White Lake - New Head Pond - Calabogie - Centennial Lake

<u>Subzones</u>	<u>Idea</u>	<u>Project</u>
5. Madawaska Highlands (Cont'd)	Attractions - crafts heritage theme Auto touring	Burnstown Inns/accommodations/roadside pull offs Vegetable stands/small stores
6. Kaladar Frontier	Back to nature Key access point Kaladar to Perth Wilderness Area Small Attractions/ Outdoor Recreation Auto Touring	Hiking trails Cross country skiing Interpretation centre Cluster of small attractions Information centre/rest area Campground Access to Vacation Village - Sharbot Lake - Arden - Silver Lake Stop over areas Outfitters Cluster points - Sharbot Lake - Arden - Silver Lake Vacation Village - Bon Echo Park vicinity Wilderness camping/survival (Outward bound) Cross country touring (hiking, skiing, snowmobiling) Skiing - cross country Canoeing - Mississippi Lake Small resorts/campgrounds Children's camps/family camps Inns/accommodations/roadside pull offs Vegetable stands/small stores

APPENDIX C

SUPPLY ANALYSIS

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APPENDIX C

SUPPLY ANALYSIS

The analysis of supply was undertaken to document the number and type of existing tourism-related facilities and to, in conjunction with the market assessment, assess the opportunity for new or expanded facilities. This information is presented by Zone and Sub-zone with a brief commentary on each. Categories are grouped under the headings:

- Natural and Historic features
- Support Services
- Transportation
- Internal population and labour force.

A. TRENTON/CORNWALL ZONE

Tourism in this Zone is based upon a strong natural resource base, heavily shoreline- and water-oriented. The Zone also boasts a strong historic and cultural base which is deeply rooted in both the early settlement of Ontario and the early days of Canadian Confederation. The area presently has an adequate supply of support services which are either urban centred or dispersed throughout the rural portions of the Zone. Road construction and access has played and will continue to play a key role in the development of tourism facilities. The 401 corridor is the dominating transportation network feature. This corridor provides good external and internal linkages throughout the Zone. The population in the Zone is generally dispersed throughout the Zone in a number of urban centres. This population provides both a base market for tourism activities as well as a labour force for the individual operations.

The analysis of this Zone concentrates upon a documentation of the support services. To this end, extensive use has been made of data provided by the Ministry of Industry and Tourism mainly through the recently completed Ontario Recreation Supply Inventory (ORSI). Unfortunately the ORSI data provides only a static picture of facilities in 1975. No time series information of sufficient detail was available to accurately indicate past supply trends. Other data were used to estimate trends where required.

1. Natural and Historic Features

The primary natural features of the Zone are the extensive shoreline, the directly related shoreline of the islands and mainland and the expanses of water. These water features afford opportunities for many recreation activities including water-oriented activities such as boating, swimming, and fishing. There is ample land associated with the shoreline to accommodate activities such as marinas, accommodation, land-based recreation (i.e., golf, riding and tennis), cottaging, picnicking, touring and visiting attractions. In areas of particularly high recreation potential, land prices and existing facilities may preclude uses with extensive land area requirements, especially those requiring shoreline.

The Zone is heavily endowed with historic features. These features provide the opportunity to represent in a realistic and authentic manner, periods of history from pre-European era, through settlement and early Canadian era, up to the bold and dramatic technology represented by Seaway construction and hydroelectric generation. Many of the necessary elements to such a presentation remain intact under the care of individuals and agencies. An inventory of these resources and their sympathetic presentation to tourists represents a unique resource of the Zone and a strong theme.

2. Support Services

The support services have been surveyed and inventoried in the ORSI program. For purposes of this study they have been analyzed under the major headings of:

- . Accommodation
- . Facilities and Attractions
- . Associated Facilities.

The sections which follow provide a detailed documentation of these services.

a) Accommodations

Five categories of accommodation facilities are discussed below. They are:

- . Hotels/Motor Inns/Lodges
- . Motels
- . Cottages/cabins
- . Tourist homes
- . Campgrounds/trailer parks.

The general pattern of distribution of these facilities is shown on Figure C-1. This map shows how different kinds of facilities are spread across the Zone, as well as the relative number of units within each sub-zone.

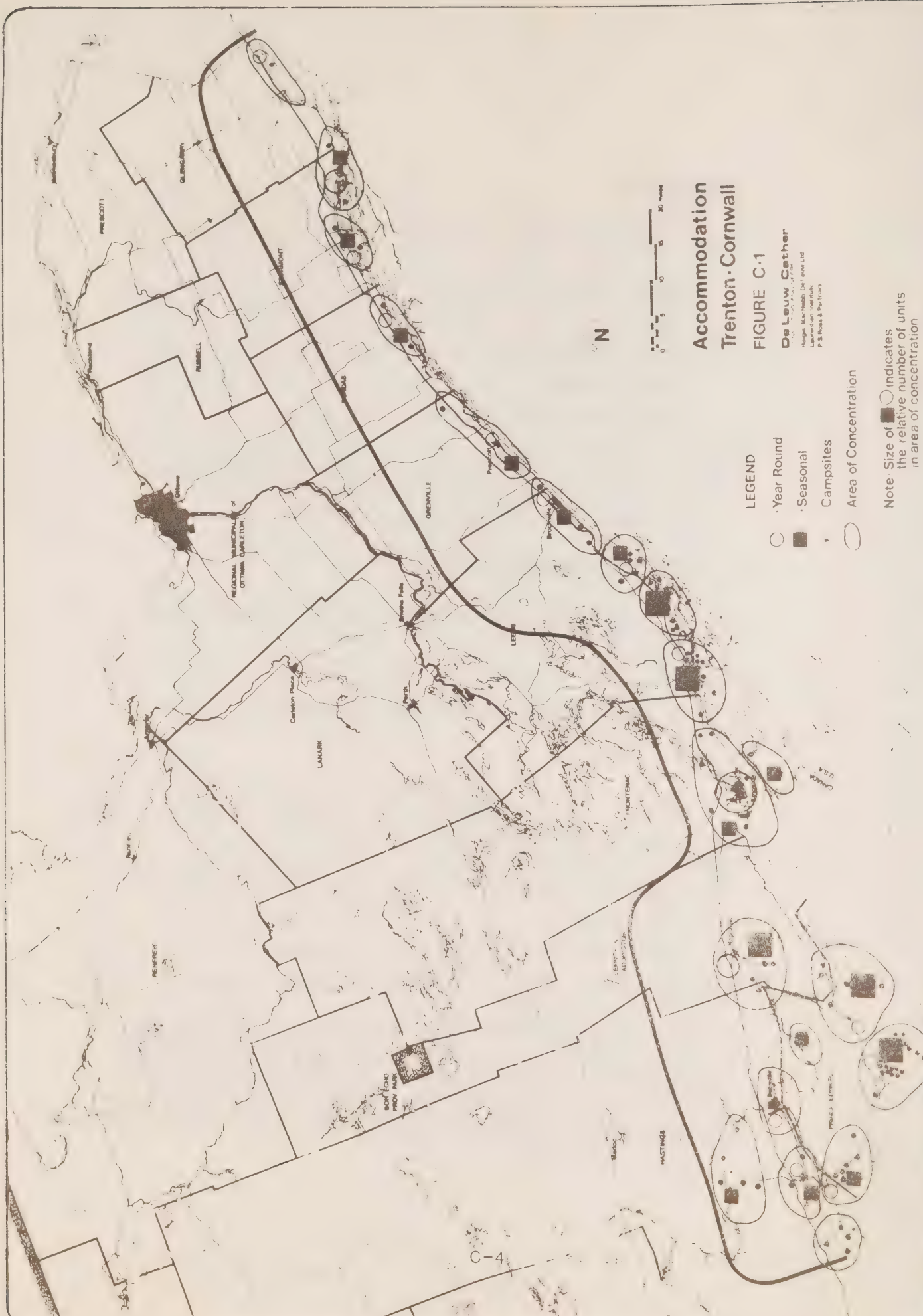
i. Hotels/Motor Inns/Lodges

Table C-1 shows the distribution of Hotels/Motor Inns/Lodges in the Zone.

TABLE C-1 Hotel/Motor Inn/Lodges

	<u>No. of Establish- ments</u>	<u>No. of Rooms</u>	<u>Avg. # Rooms per Est.</u>	<u>% of all rooms</u>
Quinte	16	573	36	25
Kingston/Wolfe Island	15	729	49	32
Thousand Islands	23	587	26	25
St. Lawrence Valley	<u>19</u>	<u>424</u>	<u>22</u>	<u>18</u>
TRENTON/CORNWALL ZONE...	73	2,313	Avg.32	100%

The concentration of rooms in the Kingston/Wolfe Island Sub-zone along with the larger average size of establishment emphasizes the central position of this Sub-zone. The newest facilities in this accommodation category in recent years have been the addition of the Holiday Inns in Kingston and Cornwall and the Four Seasons Hotel in Belleville.



Accommodation Trenton · Cornwall

FIGURE C-1

De Leuw, Cather
Associates
Maple, Mac-Nabb, De Lorme Ltd.
Landscape Architecture
P. S. Ross & Partners

LEGEND

- Year Round
- Seasonal
- Campsites
- Area of Concentration

Note: Size of [symbol] indicates the relative number of units in area of concentration

Occupancy data is available for most of the Zone and the adjacent Rideau Lakes for Hotels and Motor Hotels and were as follows:

	<u>1973</u>		<u>1974</u>	
	<u>Jan.</u>	<u>Jul.</u>	<u>Jan.</u>	<u>Jul.</u>
Number of operators	19	13	17	18
Average occupancy (%)	44	69	47	71

ii. Motels

Table C-2 indicates the distribution of motel establishments and motel rooms.

TABLE C-2 Motels

	<u>No. of Establish- ments</u>	<u>No. of Rooms</u>	<u>Avg. # Rooms per Est.</u>	<u>% of all Rooms</u>
Quinte	35	480	14	21
Kingston/Wolfe Island	19	461	24	20
Thousand Islands	17	578	34	25
St. Lawrence Valley	<u>43</u>	<u>768</u>	<u>18</u>	<u>34</u>
TRENTON/CORNWALL ZONE.....	114	2,287	20	100

Occupancy data indicate the following:

	<u>1973</u>		<u>1974</u>	
	<u>Jan.</u>	<u>Jul.</u>	<u>Jan.</u>	<u>Jul.</u>
Number of operators	18	19	10	18
Average occupancy (%)	34	76	27	77

Combining the number of establishments and available rooms in Tables C-1 and C-2, there are 187 establishments providing 4,640 rooms in the Zone. The percentage distribution of rooms by Sub-zone is as follows:

Quinte	23%
Kingston/Wolfe Island	26%
Thousand Islands	25%
St. Lawrence Valley	26%

iii. Cottages/Cabins (Rental)

TABLE C-3 Cottages/Cabins (Rental)

	<u>No. of Establish- ments</u>	<u>No. of Units</u>	<u>Avg.# Units per Est.</u>	<u>% of all Units</u>
Quinte	75	490	6.5	54
Kingston/Wolfe Island	6	42	7.0	5
Thousand Islands	24	223	9.0	25
St. Lawrence Valley	<u>12</u>	<u>145</u>	<u>12.0</u>	<u>16</u>
TRENTON/CORNWALL ZONE....	117	900	8.0	100

The heavy concentration of cottages in the Quinte Sub-zone reflects an historic market for this type of accommodation. Most of the cottages/cabins are older units and they are usually part of a family enterprise that may include other tourism facilities and services. Occupancy data indicates occupancy rates in July of 1973 at 93%, and in July of 1974 at 77%. Fluctuations of this magnitude are not uncommon for this type of accommodation. They reflect the individual nature of each establishment and the dependence upon much broader tourism flows.

iv. Campground/Trailer Parks

TABLE C-4 Campground/Trailer Parks

	<u>Public</u>	<u>Private</u>	<u>Total</u>	<u>% of all Parks</u>
Quinte	8	50	58	46
Kingston/Wolfe Island	1	6	7	5
Thousand Islands	21	16	37	29
St. Lawrence Valley	<u>13</u>	<u>12</u>	<u>25</u>	<u>20</u>
TRENTON/CORNWALL ZONE....	43	84	127	100

The heavy concentration of campgrounds in the Quinte Sub-zone reflects the extensive areas of good to excellent recreation potential as well as a strong historic market of repeat visitors.

TABLE C-5 Campsites

	<u>Individual Sites</u>	<u>Serviced Sites</u>	<u>Avg. No. Sites/ Estab.</u>	<u>% of Individual Sites</u>
Quinte	3,860	1,959	66	42
Kingston/Wolfe Island	538	380	76	6
Thousand Islands	1,287	748	34	14
St. Lawrence Valley	<u>3,519</u>	<u>1,253</u>	<u>140</u>	<u>38</u>
TRENTON/CORNWALL ZONE....	9,204	4,340	72*	100

The ORS Inventory identified only one tourist home in the zone. It is located in the Thousand Islands Sub-zone.

* This figure is derived by dividing the number of individual sites (9,204) by the total number of campgrounds (127).

v. Cottages

Cottaging is an important tourist activity in the Sub-zone and accounts for a high volume of weekend and vacation tourist activity. There are no precise counts of cottages in the area available due to the difficulties in defining a cottage and their intermittent occupancy. Table C-6 provides an estimate of the total number of cottages in 1971 by County as well as percentage change figures for five year periods from 1951 to 1971.

TABLE C-6 Cottages

<u>County</u>	<u>1971 Total</u>	<u>P e r c e n t a g e C h a n g e</u>			
		<u>1951-56</u>	<u>1956-61</u>	<u>1961-66</u>	<u>1966-71</u>
Frontenac	5600	101	36	41	50
Leeds-Grenville	4630	43	35	22	27
Lennox-Addington	1640	87	42	36	42
Prince Edward	1160	30	13	46	26
Glengarry	270	}-- 51	44	69	40
Stormont	150				
Dundas	90				
TOTAL	<u>13,540</u>				

It can be seen from the above percentage change figures that although there has been an appreciable increase in many counties in the 1966-71 period, the trend is generally slower growth than in other time periods. This observation is substantiated by an examination of the number of building permits for seasonal homes that were issued in recent years.

1 Estimation of the Number of Cottages in Ontario, by County
prepared by Recreation Analysis Group, Policy Research Branch,
Ontario Ministry of Natural Resources, Toronto, July 1973, Table 2.

TABLE C-7 Building Permits Issued for Seasonal Homes (1972-75)

<u>COUNTY</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>
Frontenac	34	57	23	7
Glengarry	1	1	-	1
Leeds	93	84	56	82
Lennox/Addington	9	4	10	7
Prince Edward	4	1	2	-
Stormont	1	-	1	2
Dundas	<u>-</u>	<u>1</u>	<u>-</u>	<u>-</u>
TOTAL	<u>142</u>	<u>148</u>	<u>92</u>	<u>99</u>

Source: Statistics Canada Building Permit
Annual Data

On the basis of these data, an estimate of approximately 10,000 cottages in the Zone appears appropriate since the Zone does not include all the lands within the counties. This represents approximately 7% of all cottages in Ontario.

b) Facilities and Attractions

The present tourism industry in the Zone is primarily water based. This is reflected in the number of beaches, marinas and boat launch and haul out facilities, as well as the location of a major portion of the seasonal accommodations described above.

ii. Beaches

The inventory identified 175 public and private beaches that are in use in the Zone, of which 60% are private (see Table C-8).

TABLE C-8 Beaches

	<u>Public</u>	<u>Private</u>	<u>Total</u>	<u>% of Total</u>
Quinte	26	72	98	56
Kingston/Wolfe Island	6	10	16	9
Thousand Islands	14	16	30	17
St. Lawrence Valley	<u>25</u>	<u>6</u>	<u>31</u>	<u>18</u>
TRENTON/CORNWALL ZONE.....	71	104	175	100

The Quinte Sub-zone has the most extensive beach areas. This further enhances its appeal to residents of Central Ontario and Toronto.

ii. Marinas

The Trenton/Cornwall Zone has 206 marinas, of which 77% are privately owned. The largest concentration of marinas is in the Quinte Sub-zone followed by the **Thousand Islands** (see Figure C-2).

TABLE C-9 Marinas

	<u>Public</u>	<u>Private</u>	<u>Total</u>	<u>% of Total</u>
Quinte	8	71	79	38
Kingston/Wolfe Island	12	22	34	17
Thousand Islands	23	42	65	31
St. Lawrence Valley	<u>5</u>	<u>23</u>	<u>28</u>	<u>14</u>
TRENTON/CORNWALL ZONE.....	48	158	206	100

iii. Other Boating Facilities

In addition to marinas, there are extensive boat launch and haul out facilities for day use boating and cruising in the Zone. Table C-10 shows the distribution of 212 public and private launch and haul out facilities. The Quinte Sub-zone contains over half of all of these facilities within the Zone. Many of the facilities are operated in conjunction with other tourism facilities, such as a lodge and cabin or a campground.

TABLE C-10 Boat Launch and Haul Out Facilities

	<u>Public</u>	<u>Private</u>	<u>Total</u>	<u>% of Total</u>
Quinte	36	76	112	53
Kingston/Wolfe Island	15	17	32	15
Thousand Islands	8	25	33	16
St. Lawrence Valley	<u>21</u>	<u>14</u>	<u>35</u>	<u>16</u>
TRENTON/CORNWALL ZONE.....	80	132	212	100

Additional information at the Zone level concerning the capacity to handle boats includes:

Boat Docking

The Zone contains 160 private boat docking facilities and 50 public ones (including marinas).

Facilities for Zone

	<u>Public</u>	<u>Private</u>	<u>Total</u>
Boat Docking	50	160	210
Docking/Mooring Space	4,125	13,153	17,278
Permanent Moored Boats	761	3,661	4,422

iv. Public Parks and Picnic Areas

Public Parks

The Zone is well served by a series of public parks. These parks have facilities and programs throughout the year. The parks are the responsibility of various agencies, both Federal and Provincial, including the National Parks program of Parks Canada, the Provincial Parks of the Ministry of Natural Resources, the Conservation Authority Parks, and Municipal and County parks and reserves. Each park differs substantially in its purpose and philosophy depending on jurisdiction. They provide a wide variety of services and facilities including camping, nature reserves, boat launching, tourist information and recreation. These parks, often in association with historic sites and attractions, provide the base of important tourist attractions for the area.

Picnic Areas

The Zone is within day-use range of several large urban municipalities. Picnic areas provide not only the tourist but also local residents with a convenient inexpensive alternative to more formal eating. Several public agencies provide a useful service to the travelling public in the establishment and maintenance of picnic areas. Table C-11 indicates the number and distribution of picnic areas throughout the Zone.

TABLE C-11 Picnic Areas

	<u>Sites</u>	<u># of Tables</u>	<u>Avg.# Tables</u>	<u>% of Total Tables</u>
Quinte	72	2,832	39	45
Kingston/Wolfe Island	27	509	19	8
Thousand Islands	46	620	13	10
St. Lawrence Valley	<u>47</u>	<u>2,303</u>	<u>49</u>	<u>37</u>
TRENTON/CORNWALL ZONE.....	192	6,264	33	100

v. Trails

The Zone contains a great variety of winter and summer trails. As yet these trails are not all described or plotted on a single map. The exact locations and trail lengths are often only known locally. The accompanying figures illustrate the available information on trails.

Winter Trails (See Figure C-3)

A total of 104 winter trails were identified throughout the Zone. These include:

Snowmobiling.....	39
Cross country ski/Snowshoe....	50
Downhill ski/Toboggan.....	10
Toboggan only.....	5

There are three major trails with parts thereof in the Trenton/Cornwall Zone. They are:

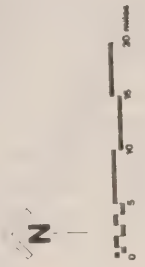
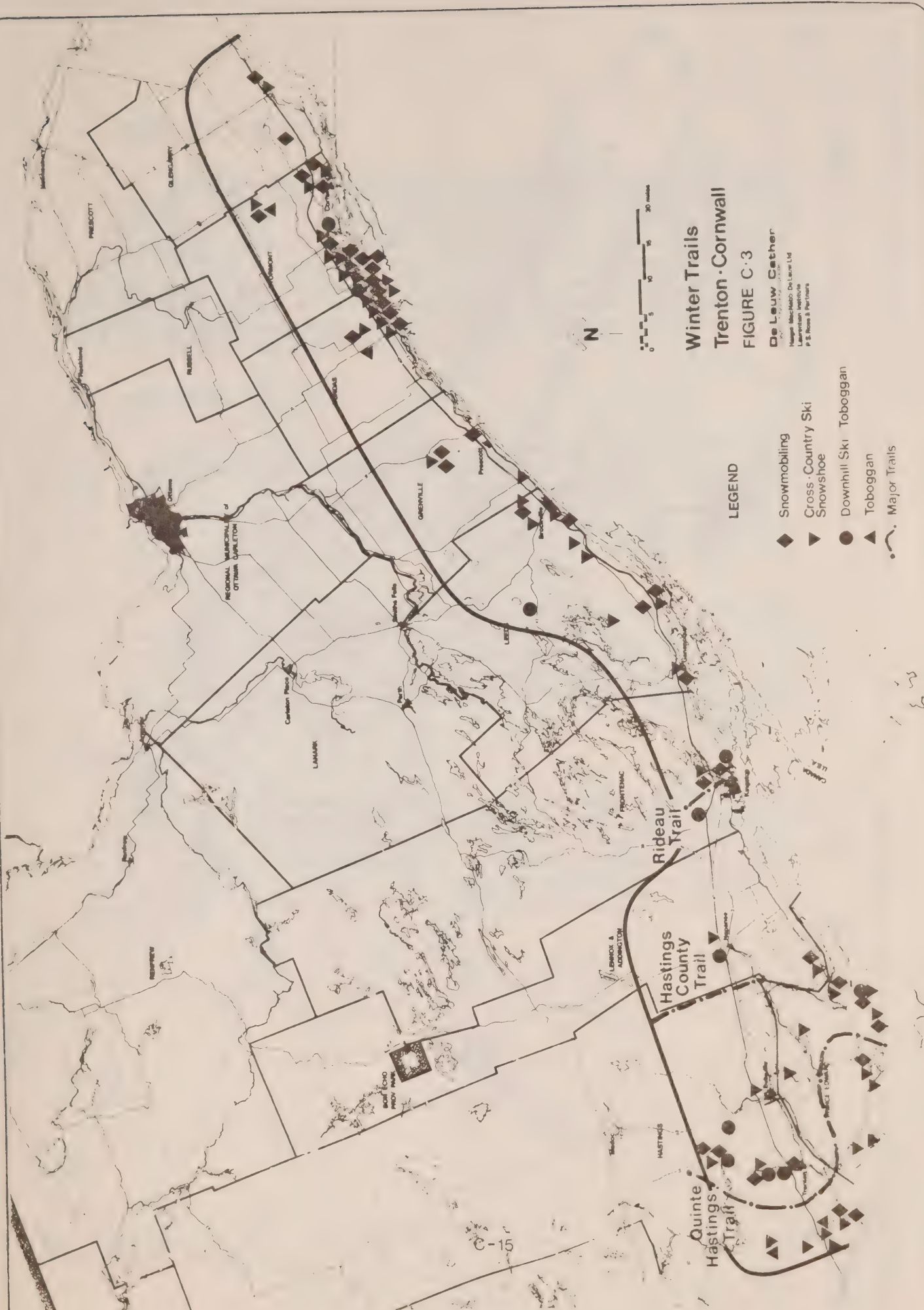
- . The Rideau Trail -
200 miles for cross country skiing and snowshoeing
- . The Quinte Hastings Trail -
250 miles for cross country ski/snowshoeing
- . The Hastings County Trail -
350 miles for snowmobiling.

Summer Trails (See Figure C-4)

Sixty-seven summer hiking trails and related facilities were identified in the Zone. These included the following:

Sites that had facilities within one mile...	34
Conservation Areas.....	14
Regional and Municipal.....	13
Provincial.....	5
Federal.....	1

Major trails include the Rideau and the Quinte Hastings Trails.

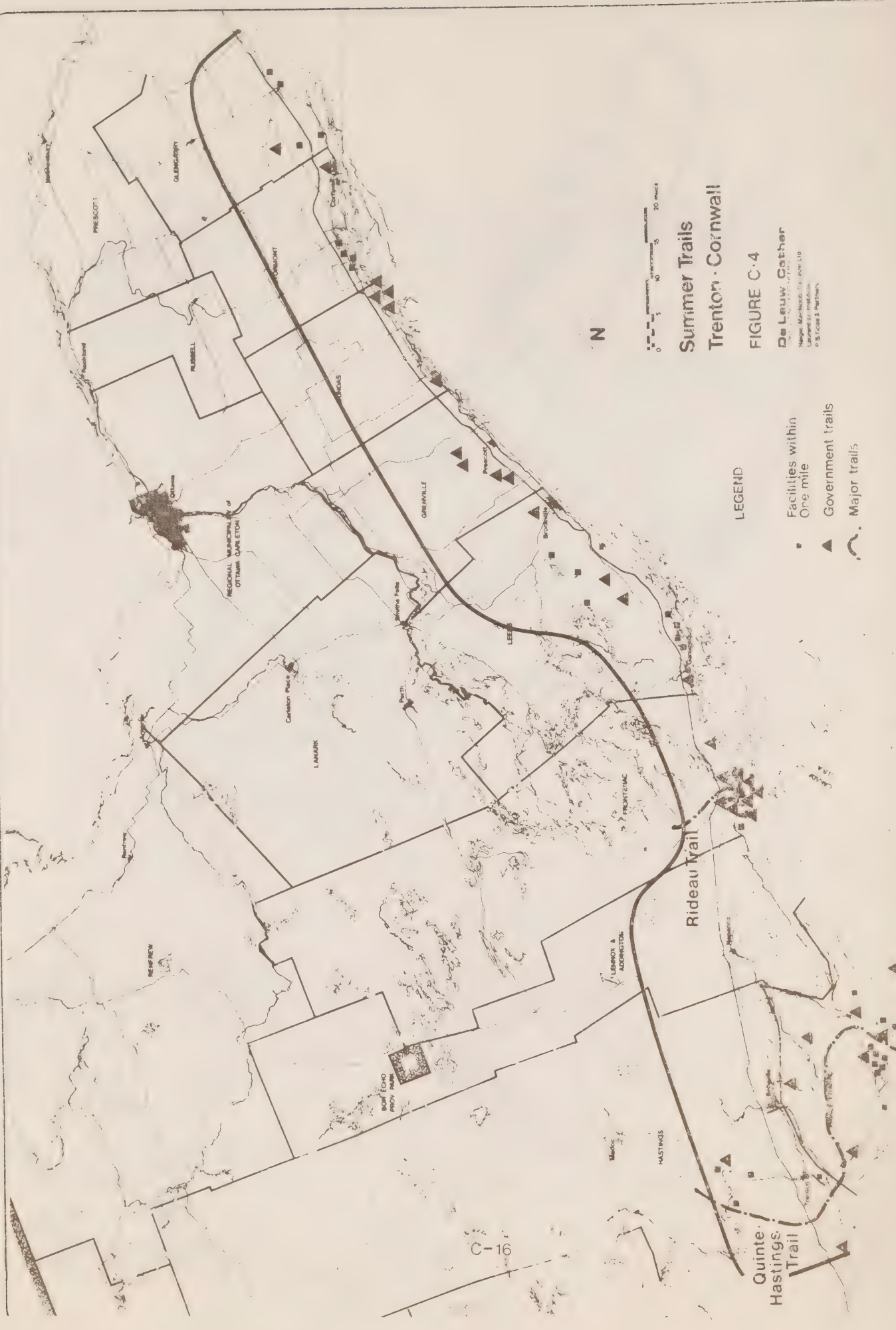


Winter Trails
Trenton-Cornwall
FIGURE C-3

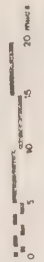
DeLeuw Cather
 INC.
 1000
 Highway MacMillan De Leuw Ltd
 1000
 1000
 1000

LEGEND

- ◆ Snowmobiling
- ▼ Cross-Country Ski
- Downhill Ski
- ▲ Toboggan
- Major Trails
- Snowshoe
- Toboggan



N



Summer Trails Trenton-Cornwall

FIGURE C-4

De Leuw Cather
INCORPORATED
1000 SHEPPARD AVENUE EAST
SUITE 1000
SCARBOROUGH, ONTARIO
M1B 3Y9
Tel: (416) 291-1100
Fax: (416) 291-1101
www.deleuw.com

LEGEND

- Facilities within One mile
- Government trails
- Major trails

vi. Commercial Attractions

The Zone has a wide variety of commercial attractions. These consist of the boat tours along the Seaway and Thousand Islands as well as several land-based attractions such as the Sky Tower at Ivy Lea. Generally, commercial attractions, particularly those smaller attractions, are heavily dependent upon support from local residents, require high traffic volumes and have generally lacked the size and quality to attract tourists to the area. Those attractions of a large scale, such as Upper Canada Village and Fort Henry, are for the most part publicly supported.

vii. Associated Facilities

Many of the services, such as service stations, recreation, entertainment and shopping, are located in the urban areas throughout the Zone. These services are often dependent upon local residents on a year-round basis and available to tourists during the summer season. Some of the present highly tourist-oriented areas offer shops and services catering exclusively to the tourist, usually on a seasonal basis.

Tourist Information services are generally readily available, particularly to tourists from outside of Ontario. Ontario residents, particularly those within day- or weekend-use range, are often poorly served by the standard information booths. Information about activities and events is often not readily available to these easily accessible markets.

c. Transportation

The 401 east-west corridor provides the basic transportation link within the Zone and for points outside the Zone. There are numerous cross linkage roads which provide north-south access. Table C-12 indicates annual vehicle trips on the five most highly used highways in the Zone. This table serves to emphasize the importance of the 401 as the major transportation carrier by the consistently high traffic volumes across the Zone.

TABLE C-12 TRAFFIC VOLUMES 1974 (ANNUAL TWO-WAY TRAFFIC)

<u>Highway No.</u>	<u>Location</u>	<u>Annual Traffic</u> *
		(Two-way traffic)
33	Kingston	8,212,500
	Glenora Ferry	419,750
	Picton	720,875
	Wellington	529,250
	Trenton	1,606,000
401	Brockville	4,416,500
	Kingston	5,219,500
	Trenton	6,205,000
2	Cornwall	1,825,000
	Brockville	1,606,000
	Kingston	5,657,500
	Trenton	4,854,500
29	Brockville	1,806,750
37	Belleville	1,770,250
<u>Bridge Links</u>		
	Ivy Lea	1,228,590
	Johnstown	216,810
	Cornwall	210,970

* Source: 1974 Traffic Volumes on the King's Highway and Secondary Highways, Ministry of Transportation and Communications.
(AADT rates X 365 = Annual Traffic)

The bridge linkages across the St. Lawrence at Ivy Lea, Johnstown and Cornwall are important entrance and exit points for both U.S. and Canadian travellers. These points of natural traffic concentration require particular attention in a tourism strategy.

The Zone is served by regularly scheduled Commercial Bus lines. However, linkage between other than major centres is often limited to once or twice daily service. Similarly, train service is available to major centres on a frequent interval, but on less frequent interval to smaller centres.

The nearest International airport is located in Ottawa. Limited commercial flights out of Kingston airport are being considered at this time. There are a number of smaller airports, both public and private, throughout the Zone to serve the private airplane owner.

d. Population

The local population in the Zone is shown in the following table:

TABLE C-13 Population

	<u>1971</u>	<u>1976</u>
Quinte	130,842	142,176
Kingston/Wolfe Island	87,246	90,188
Thousand Islands	39,593	40,558
St. Lawrence Valley	<u>89,651</u>	<u>89,835</u>
TRENTON/CORNWALL.....	<u>347,332</u>	<u>362,757</u>

e. Summary

Table C-14 provides a general summary of the supply situation in the Trenton/Cornwall Zone.

TABLE C-14

GENERAL ZONE SUPPLY INVENTORY -- SUMMARY TRENTON/CORNWALL

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
<ul style="list-style-type: none"> entire St. Lawrence shoreline, including the islands, have high capability for intensive recreation use (i.e., swimming, camping, cottaging, boating) shoreline and islands also have high potential for extensive activities (i.e., viewing, hiking, etc.) major beaches along shoreline numerous parks (St. Lawrence Parks Commission) and government campsites along shoreline gateway to Trent/Severn system zone highly dependent upon natural resource base, particularly shoreline - highly seasonal summer focus most recreational activities based on natural resource features (i.e., Thousand Island boat trips, Seaway Locks, etc.) future potential also appears to be around shoreline - possibility of extending the season 	<ul style="list-style-type: none"> zone has historical landscape with high potential for year-round visitation (i.e., Old Fort Henry (Kingston), Upper Canada Village (Morrisburg), etc.) Festival De la Semaine Francaise is a cultural event (Cornwall) based on French culture educational attractions are located in Kingston (Royal Military College, Queen's University, etc.) 	<ul style="list-style-type: none"> Kingston serves as a regional service centre, Belleville/Trenton is an area centre, and Brockville, Gananoque and Cornwall are local service centres Kingston - approximately 1500 year-round hotel/motel units -around 600 private campsites -wide variety of entertainment/shopping/dining opportunities Belleville/Trenton - serves southern portion of zone - around 700 hotel/motel units - limited services Brockville/Cornwall - serves northern portion of zone -Brockville: approximately 500 hotel/motel units -Cornwall: around 600 hotel/motel units -500 to 1000 seasonal resort units Gananoque - highly dependent on tourism, highly seasonal - approximately 650 seasonal resort units 2 Provincial parks with campsites, plus numerous government campsites medium density cottaging from Kingston to Gananoque 	<ul style="list-style-type: none"> served by the Eastern Ontario and Central Ontario Travel Associations Travel Information Centres at Lansdowne, Johnstown (near Prescott) and Cornwall 	<ul style="list-style-type: none"> excellent, year-round access by road (Highway 401) and rail (C.N.R.) 3 entry points from U.S.A. (Lansdowne, Prescott, Cornwall) access to Lake Ontario, St. Lawrence shorelines by boat (i.e., major harbours at Kingston, Cornwall and Brockville). Access also through Trent/Severn and Rideau (River and Canal) system potential for increasing boat access numerous small air bases with non-scheduled services scattered throughout zone internal road and rail linkage good scenic coastal drive along Highway 2 (Heritage Route) 	<ul style="list-style-type: none"> Population - approximately 350,000

Source: "Tourism Development In Ontario: A Framework for Opportunity", prepared by Balmer, Crapo and Associates for the Ministry of Industry and Tourism, Province of Ontario, March, 1976.

B. RENFREW-KINGSTON ZONE

Tourism in this Zone is largely based upon the natural features throughout the Zone. The Rideau Canal System and the associated lakes and rivers provide an important tourism resource which has the potential for intensive recreational activity. The more rugged lands associated with the Canadian Shield are capable of supporting extensive recreational activity. Many of the historic and cultural attractions in the Zone are located in Kingston. The Canal system with its locks and the associated communities have historic significance. In the more rugged lands, the evidence of early settlement can still be seen, including the remains of some of the early economic activities, such as lumbering, agriculture and mining. The Zone is adequately served by support facilities. These facilities are either heavily traffic-oriented or seasonal in nature. Regional centres of Kingston and Ottawa dominate the support service aspect of the Zone. There are six Provincial Parks with campsites in the Zone and a large number of private campsites. The transportation network provides good access to the Zone. Internal access varies considerably from relatively easy access in the southern portion to limited access in the northern areas.

1. Natural and Historic Features

As noted above, the natural features of the area include the lakes and rivers and their associated shoreline. The lands along the Rideau Canal system are some of the older cottaging areas in Ontario because of their special character and close proximity to Ottawa and Kingston. A number of Provincial Ministries and Agencies are seeking to preserve and improve the natural environment of this area. The rugged Canadian Shield areas in the northern portion are for the most part Crown lands with pockets of private land holdings. Crown land management policies which allow mixed uses, particularly recreation, will assist tourism promotion and development in these areas. The Zone has a strong sense of history due to the evidences of historic activities.

2. Support Services

The ORSI program surveyed and inventoried the support services of the Zone. For purposes of this Study, they have been analyzed under the following major headings:

- . Accommodation
- . Facilities and Attractions
- . Associated Facilities

The sections which follow provide detailed documentation of these services.

a. Accommodations

Five categories of accommodation facilities are discussed below. They are Hotel/Motor Inn/Lodge, motels, cottages/cabins, tourist homes, and campground/trailer parks. The general pattern of distribution of these facilities is shown on Figure C-5.

i) Hotel/Motor Inn/Lodge.

TABLE C-14 - Hotel/Motor Inn/Lodge

	<u>Number of Establishments</u>	<u>Number of Rooms</u>	<u>Average Number of Rooms Per Establishment</u>	<u>% of all Rooms</u>
Kingston/Wolfe Island	15	729	49	67
Rideau	11	250	23	22
Carleton Place/Almonte	1	10	10	1
Ottawa River Valley	2	28	14	3
Madawaska	3	35	11	3
Kaladar	5	39	8	4
RENFREW/KINGSTON ZONE	37	1091	29	100

Table C-14 shows the distribution of Hotel/Motor Inn/Lodge facilities in the Zone. The only large hotels and motor inns operating year round are the Kingston Sub-zone. The only new facility in this category in recent years has been the Holiday Inn in Kingston, although at least one other facility is undergoing a major expansion in the Rideau Sub-zone.

ii) Motels

One third of the motels and nearly half of the motel rooms are in the Kingston Sub-zone. The other Sub-zones with concentrations of motel rooms are the Rideau Lakes, the Ottawa River Valley and the Kaladar Frontier. This distribution reflects the traditional importance of Highways 15, 7 and 17. The distribution of motels throughout the Sub-zones is indicated in Table C-15.



Accommodation Renfrew-Kingston

FIGURE C-5

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LEGEND

- Year Round
- Seasonal

Campsites

Area of Concentration

C-23

Note: Size of ■ ○ indicates the relative number of units in area of concentration

TABLE C-15 - Motels

	Number of Establishments	Number of Rooms	Average Number of Rooms Per Establishment	% of all Rooms
Kingston/Wolfe Island	19	461	24	48
Rideau Lakes	11	148	13	15
Carleton Place/Almonte	5	60	12	6
Ottawa River Valley	8	147	18	15
Madawaska Highland	2	19	9.5	2
Kaladar Frontier	12	135	11	14
RENFREW/KINGSTON ZONE	57	970	17	100

Combining the number of establishments and available rooms in Tables C-14 and C-15. There are 94 establishments providing 2061 rooms in the Zone. The percentage distribution of rooms by Sub-zone is as follows:

Kingston/Wolfe Island	58%
Rideau Lakes	19%
Carleton Place/Almonte	3%
Ottawa River Valley	8%
Madawaska Highlands	3%
Kaladar Frontier	8%

iii) Cottages and Cabins (for rental)

Cottages and cabins for rent are important means of tourist accommodation in Kaladar and Rideau Sub-zones (Table C-16).

Most of the cottages/cabins are older units, and they are usually part of a larger family enterprise that may include lodges or motel, campground, marina or some combination of these facilities, together with a private beach.

TABLE C-16 - Cottages/Cabins (Rental)

	Number of Establishments	Number of Units	Average No. of Units Per Establishment	% of Total Units
Kingston/Wolfe Island	6	42	7	3
Rideau Lakes	87	585	7	35
Carleton Place/Almonte	3	27	9	2
Ottawa River Valley	6	38	6	2
Madawaska Highlands	26	141	5	9
Kaladar Frontier	105	821	8	49
RENFREW/KINGSTON ZONE	233	1654	7	100

iv) Campground/Trailer Park

There are a total of 163 campgrounds/trailer parks in the Zone, including those both publicly and privately owned (see Table C-17). Their distribution in the Zone follows a pattern similar to that of the cottages/cabins. This pattern is primarily a result of an extensive area with high recreation potential which is accessible to large urban centres.

TABLE C-17 - Campground/Trailer Park

	Number of Establishments			% of Total
	Public	Private	Total	
Kingston/Wolfe Island	1	6	7	1
Rideau Lakes	8	40	48	30
Carleton Place/Almonte	3	8	11	8
Ottawa River Valley	1	11	12	8
Madawaska Highlands	0	27	27	17
Kaladar Frontier	12	46	58	36
RENFREW/KINGSTON ZONE	25	138	163	100

The ORSI provides an indication of the number of individual sites and the number of these sites which are serviced (see Table C-18). The average size of camping establishment for the Zone is 60 sites.

TABLE C-18 - Campsites

	Individual Sites	Average Number of Sites Per Establishment	% of Total Number of Sites
Kingston/Wolfe Island	538	77	5
Rideau Lakes	2,344	49	24
Carleton Place/Almonte	808	73	8
Ottawa River Valley	1,330	110	13
Madawaska Highlands	835	31	8
Kaladar Frontier	3,998	69	42
RENFREW/KINGSTON ZONE	9,853	60	100

There was much comment among campground operators on the competition between public campgrounds and private campgrounds. Although the public campgrounds are significantly larger than the private establishments, the private establishments still account for about 75.8% of total sites. Interviews with campground operators also indicated that fewer and fewer sites in private campgrounds are available to transient campers as more sites are leased on a monthly,

seasonal or even yearly basis. This suggests a differentiation of camping markets. The public sites catering to longer lease occupants

v) Cottaging

Cottaging is an important tourist activity in the Renfrew/Kingston Zone. Although there are no precise counts of cottages available in sufficient detail to allow a detailed breakdown by Sub-zone, the following Table C-19 provides estimates of the total number of cottages in 1971 by County for those counties in the Zone as well as percentage change figures for these cottage estimates from 1951 to 1971.

TABLE C-19

	<u>1971 Total</u>	<u>1951-56</u>	<u>Percentage 1956-61</u>	<u>Change 1961-66</u>	<u>1966-71</u>
Frontenac	5600	101	36	41	50
Renfrew	4840	157	68	33	39
Leeds-Grenville	4630	43	35	22	27
Lanark	3930	95	57	37	37
Ottawa-Carleton	2090	66	28		
Lennox-Addington	<u>1640</u>	87	42	36	42
Total	22730				

Source: Estimate of the Number of Cottages in Ontario, by County prepared by Recreation Analysis Group, Policy Research Branch, Ontario Ministry of Natural Resources, Toronto, July 1973, Table 2.

It can be seen from the above percentage change figures that although there has been an appreciable increase in many counties in the 1966-71 period, the trend is generally slower growth than in other time periods. This observation is substantiated by an examination of the number of building permits for seasonal homes that were issued in recent years.

TABLE C-20 - Building Permits Issued for Seasonal Homes

COUNTY	1972	1973	1974	1975
Frontenac	34	57	23	7
Lanark	15	21	21	9
Leeds	93	84	56	82
Lennox/Addington	9	4	10	7
Ottawa-Carleton	4	9	1	1
Renfrew	55	55	42	53
Total	210	230	153	159

Source: Statistics Canada Building Permit Annual Data

The above data are for counties. The actual Zone itself is estimated to contain roughly 14,000 cottages. This represents approximately 10% of the cottages in Ontario.

The ORSI identified only five tourist homes in the Zone, three of which are in the Rideau Lakes Sub-zone and two in the Kaladar Frontier.

b. Facilities and Attractions

The present tourism industry in the Zone is primarily water-based. This is reflected in the number of beaches, Marinas and boat launch and haul out facilities, as well as the location of a major proportion of the seasonal accommodations described above.

i) Beaches

The Inventory identified 228 public and private beaches that are in use in the Zone, of which 75% are private (Table C-21). Many operators and tourists commented upon the lack of public beaches and swimming areas. This lack reflects a natural shortage of good quality sand beaches.

TABLE C-21 - Beaches

	Public	Private	Total	% of Total No. of Beaches
Kingston/Wolfe Island	6	10	16	7
Rideau Lakes	9	41	50	22
Carleton Place/Almonte	5	8	13	6
Ottawa River Valley	9	11	20	9
Madawaska Highlands	1	29	30	13
Kaladar Frontier	28	71	99	43
RENFREW/KINGSTON ZONE	58	170	228	100

ii) Marinas

The Renfrew/Kingston Zone has 223 marinas of which 3/4 are privately owned (Table C-22). The largest concentration of marinas is in the Kaladar Frontier Sub-zone. The largest facilities are in the Kingston Sub-zone, catering primarily to Lake Ontario boaters. Many of the marinas in the Rideau Lakes Sub-zone are along the Rideau Canal system where they cater to both resident and transient boating populations. Marinas in the other four Sub-zones serve mainly their own local markets of cottagers and campers.

TABLE C-22 - Marinas

	<u>Public</u>	<u>Private</u>	<u>Total</u>	<u>% of Total No. of Marinas</u>
Kingston/Wolfe Island	12	22	34	15
Rideau Lakes	8	29	37	17
Carleton Place/Almonte	3	6	9	4
Ottawa River Valley	8	13	21	9
Madawaska Highlands	1	25	26	12
Kaladar Frontier	<u>17</u>	<u>79</u>	<u>96</u>	<u>43</u>
RENFREW/KINGSTON ZONE	49	174	223	100

iii) Other Boating Facilities

There are extensive boat launch and haul out facilities for day use boating and cruising. (See Figure C-6)

Table C-23 shows the distribution of 289 public and private launching and haul out facilities. The Kaladar and Rideau Lake Sub-zones contain the largest proportion of the facilities. Most of the private launch and haul out facilities are in conjunction with other tourism facilities, such as a lodge and cabins, or a campground.



N

0 5 10 15 20 miles

Marinas and Public Parks Renfrew · Kingston

FIGURE C-6

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LEGEND

- Marinas
- △ Public Parks

TABLE C-23 - Boat Launch and Haul Out

	<u>Public</u>	<u>Private</u>	<u>Total</u>	<u>% of Total No. of Facilities</u>
Kingston/Wolfe Island	15	17	32	11
Rideau Lakes	24	40	64	22
Carleton Place/Almonte	6	8	14	5
Ottawa River Valley	13	9	22	8
Madawaska Highlands	17	28	45	16
Kaladar Frontier	<u>59</u>	<u>53</u>	<u>112</u>	<u>38</u>
RENFREW/KINGSTON ZONE	134	155	289	100

Additional information at the Zone level concerning the capacity to handle boats includes:

	<u>Public</u>	<u>Private</u>	<u>Total</u>
Boat Docking	49	215	264
Dock/Mooring Space	3,803	13,595	17,398
Permanent Moored Boats	561	3,608	4,169
Dry Docking Spaces	0	799	799
Number of Ships	15	1,686	1,701

iv. Public Parks and Picnic Areas

The Zone is well served by a series of public parks as indicated in Figure C-6. There are six public parks offering a variety of recreation and camping experiences. These parks are of good quality and generally serve as a focus for tourist activities. Most of the parks are provincial parks. In addition, there are three park reserves which may be developed into provincial parks in the future.

v. Picnic Areas

Despite the fact that the Zone offers good opportunities for recreational driving and touring, little attention has been paid to providing picnic areas. The picnic sites throughout the Zone are generally small and unevenly distributed. The limited number of tables per site is in keeping with the tourist usage of the area. However, the sites themselves should be developed and maintained to promote their use. Much of the responsibility for picnic areas rests with public agencies. Table C-24 illustrates the present distribution of picnic sites and tables.

TABLE C-24 - Picnic Areas

	<u>Sites</u>	<u>Tables</u>	<u>Average No. of Tables Per Site</u>	<u>% of Total No. of Tables</u>
Kingston/Wolfe Island	27	509	19	22
Rideau Lakes	31	751	24	33
Carleton Place/Almonte	20	224	11	10
Ottawa River Valley	16	280	18	12
Madawaska Highlands	12	64	5	3
Kaladar Frontier	42	479	11	20
RENFREW/KINGSTON ZONE	148	2,307	16	100

vi. Downhill Skiing

There are three existing downhill ski areas in the Madawaska Highlands Sub-zone at Calabogie, Dacre and Pakenham. A fourth smaller facility is located just north of Kingston in the adjacent part of the Rideau Lakes Sub-zone. These facilities have vertical drops in the order of 750 feet, 620 feet, 300 feet and 135 feet respectively. The potential exists for one or two more facilities with vertical drops of up to 1000 feet. These higher vertical drop distances, i.e. 600-1000 feet, are among the highest in Ontario and comparable with facilities in Western Quebec.

vii. Trails

The Zone contains a great variety of winter and summer trails, with the major ones being the Rideau and K and P Trails. As yet, these trails are not all described or plotted on a single map.

viii. Winter Trails (Figure C-7)

A total of 78 winter trails were identified throughout the Zone. These include:

- snowmobiling 38
- cross-country skiing/
snowshoeing 30
- downhill skiing/
tobogganing 5
- tobogganing only 5

Major trails include:

- the Rideau Trail 200 miles for cross-country skiing and snowshoeing
- the K & P Trail 22 miles for cross-country skiing, snowshoeing and snowmobiling.



Winter Trails Renfrew-Kingston

LEGEND

- ◆ Snowmobiling
- ▼ Cross-Country Ski/Snowshoe
- Downhill Ski/Toboggan
- ▲ Toboggan
- Major Trails

FIGURE C-7

De Leuw Cather

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Laurentian Institute
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C-32

ix. Summer Trails (Figure C-8)

Ninety summer trails and related facilities were identified in the Zone. These included the following:

- Sites which had facilities within one mile	65
- Conservation areas	15
- Regional and municipal facilities	4
- Provincial	5
- Federal	1

Major trails include the Rideau and the K and P Trail.

x. Commercial Attractions

The Zone has several commercial attractions of generally small scale. Most typical of these is the Champlain Storyland near Renfrew and Bonnechere Caves near Eganville. These attractions are seasonal in nature and generally family owned and operated. They depend extensively on the local residents within easy access. Large scale attractions are limited to the Kingston area such as Old Fort Henry.

c. Associated Facilities

Many of the services throughout the Zone serve the local area or the commercial traveler. The tourist traveling for other than work-related purposes usually makes up a small proportion of the business for these facilities. In the community contacts program many of the interviewees commented upon the need for recreation and entertainment to augment the activities available to the tourist.

Tourist Information services are generally provided by local organizations for particular municipalities. More emphasis and co-ordination is required to provide the materials for these booths and adequately informed staff. The location of regionally-oriented information services would assist the visitor in gaining information about the area and the activities available. In particular, the local market for tourists on a day basis should receive priority in the form of information and advertising. The Ottawa and Kingston markets offer potential day trippers for this area as documented by the success of attractions and festivals in the area.



Summer Trails
Renfrew-Kingston

LEGEND

- Facilities within One mile
- ▲ Government trails
- Major trails

FIGURE C-8

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C-34

d. Transportation

The major corridors are Highways 401, 7, 15 and 17/417. Access to the area from outside the Zone is good. General access becomes more limited to the north and west of the Zone. The opportunity exists for construction of several connecting roads to link and make accessible the northwestern portion as shown in recent MTC Studies. The local roads are a valuable resource in that they provide the opportunity for touring and sightseeing in the rural areas. Table C-25 presents annual traffic volume data for the five most travelled roads in the Zone. This information is calculated from the most heavily travelled section of the highway as indicated. This serves to emphasize the importance of Highways 401, 15, 7 and 17.

The Zone has regularly scheduled bus and train service to major centres. The nearest International Airport is in Ottawa; however, commercial flights originate from Pembroke and Carp and there are numerous municipal and private airports available for pilots with their own planes. Outfitters and seaplanes are available at several points in the northern portion of the Zone to provide access to wilderness sites in Quebec and other inaccessible locations in Ontario in or near Algonquin Park.

TABLE C-25 - Traffic Volumes 1974 - (Annual Two-Way Traffic)

<u>Highway No.</u>	<u>Locations</u>	<u>Annual Traffic</u>
7	Stittsville	3,102,500
	Carleton Place	2,847,000
	Perth	1,423,500
	Kaladar	1,332,250
17	Carp Rd. (zone boundary)	2,226,500
	Arnprior	3,047,750
	Renfrew	1,898,000
	Pembroke	3,102,500
16	Rideau River Bridge	748,250
	Zone Boundary	2,190,000
29	Brockville	1,806,750
	Carleton Place	1,322,250
	Arnprior	511,000
15	Kingston	1,679,000
	Smiths Falls	1,642,500
	Carleton Place	1,095,000

Source: 1974 traffic volumes on the King's Highway and Secondary Highways, Ministry of Transportation and Communications.
(AADT rates x 365= Annual Traffic).

e. Population

The local population in the Zone totals nearly 220,000. Its distribution is shown by Sub-zone in Table C-26.

TABLE C-26 - Population

	<u>1971</u>	<u>1976</u>
Kingston/Wolfe Island	87,246	90,188
Rideau Lakes	40,393	43,437
Carleton Place/Almonte	21,800	26,772
Ottawa River Valley	29,775	32,535
Madawaska Highlands	5,268	5,589
Kaladar Frontier	<u>18,593</u>	<u>19,745</u>
RENFREW-KINGSTON ZONE	203,015	218,266

Source: Statistics Canada

f. Summary

Table C-27 provides a summary of the supply inventory for the Renfrew-Kingston Zone.

Table C-27

ZONE SUPPLY INVENTORY - RENFREW-KINGSTON

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
<ul style="list-style-type: none"> lake and rivers along Rideau Canal System and St. Lawrence shoreline, from Kingston to Gananoque, have potential for intensive recreational activity (swimming, camping, cottaging, boating, angling, etc.) natural landscape capable of supporting extensive recreational activity - rugged Canadian Shield Topography current development based heavily on natural resources - summer focus potential for further development on the Rideau Waterway System 	<ul style="list-style-type: none"> attractions with historical emphasis at Kingston (i.e., Old Fort Henry, Bellevue House National Historic Site) agricultural and small scale mining landscape in the north and west has potential for theme development rich historical landscape with potential for tourism development - early settlement theme educational attractions at Kingston include the Royal Military College and Queen's University Rideau Canal system 	<ul style="list-style-type: none"> Kingston is a regional service centre. Local service centres are Smith Falls, Perth and Renfrew Kingston - approximately 1500 year round hotel/motel units, around 600 private campsites wide variety of dining/entertainment and shopping facilities other local service centres provide essential services to local area a relatively large number of private campsites near Carleton Place 5 Provincial parks with campsites in zone Ottawa serves as an external service centre 	<ul style="list-style-type: none"> the zone is served by the Central Ontario and Eastern Ontario Travel Associations 	<ul style="list-style-type: none"> excellent road (Highways 401, 17 and 7) and rail (C.N.R. and C.P.R.) access boat access via the Rideau or Rideau/Trent/Severn Systems internal road network is reasonably efficient 	<ul style="list-style-type: none"> Population - approximately 221,000 Age Breakdown 0-14 years - approx. 26% 15-24 years - approx. 19% 25-54 years - approx. 37% greater than 54 years approx. 18%

Source: "Tourism Development in Ontario: A Framework for Opportunity"; prepared by Balmer, Crapo and Associates for the Ministry of Industry and Tourism, Province of Ontario, March 1976.

APPENDIX D
MARKET ANALYSIS

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APPENDIX D

MARKET ANALYSIS

The analysis of demand which has been conducted for this Study has addressed two major tasks. The first of these is an understanding of the present tourism activities in the Zones, the who, where and why of the present situation. The second involves looking into the future and outlining the possible areas in which tourism can grow and estimating this growth.

Estimates of future growth are based upon a number of hypotheses and assumptions, some stated and some unstated. It was not within the scope of this Study to test in any detailed way the hypotheses presented. This should be the subject of further detailed studies for each type of opportunity.

This appendix begins with a description of the present tourist travel to the Zones and the characteristics of the tourists. The review of the present market is followed by a review of the major markets upon which tourism in these Zones must directly rely. As has been illustrated in the main Report, there are four major markets within easy access to each of the Zones. Profiles of these markets showing present trends are reviewed to provide insight into potential types of tourist facility which must cater specifically to these major markets. Concluding this discussion, an outlook section looks to the major factors which will affect tourist travel in the future. A summary section draws information on both Supply and Demand to provide the basic estimates of demand for particular types of tourism facilities.

A. MARKET INDICATORS

In order to describe the present tourism market, a series of indicators have been selected. They are described in the following section.

1. Local Population and its Growth

Table D-1 presents data on the local population by Sub-zone. This population has been projected on the basis of the most recent projections provided by the Ministry of Treasury, Economics and Intergovernmental Affairs. This projection was based on 1971 data and results in a growth rate of 0.6% per annum between 1971 and 1986. Recent growth in local population from 1971 to 1976 as documented by Census Canada has been at an annual rate of 1.2%. The Provincial projections may represent a very conservative projection.

TABLE D-1 PRESENT AND PROJECTED POPULATION BY SUB-ZONE

<u>SUB-ZONE</u>	<u>1971</u> ²	<u>1976</u> ²	<u>1986</u> ³	<u>2001</u> ³
Quinte	130,842	142,176	148,958	165,504
Kingston/Wolfe Island	87,246	90,188	99,231	105,376
Rideau Lakes	40,393	43,437	43,504	46,184
Carleton Place/Almonte	21,800	26,772	24,833	27,441
Ottawa River Valley	29,775	32,535	32,085	34,308
Madawaska Highlands	5,268	5,589	5,412	5,485
Kaladar Frontier	18,593	19,745	21,311	23,199
Thousand Islands	39,593	40,558	40,245	41,755
St. Lawrence Valley	<u>89,651</u>	<u>89,835</u>	<u>94,154</u>	<u>95,307</u>
TRENTON/CORNWALL ZONE	347,332	362,757	382,588	407,942
RENFREW/KINGSTON ZONE	<u>203,015</u>	<u>218,266</u>	<u>226,376</u>	<u>241,993</u>
TOTAL BOTH ZONES ¹	463,101	490,835	509,733	544,559

Notes: 1. Zones do not add due to common Kingston/Wolfe Island Sub-zone.

2. Census of Canada 1971, 1976

3. Ontario's Changing Population, Vol. 2, TEIGA

2. Market Population and Its Growth

In order to provide an estimate of present and projected population within ready day use access range of the Sub-zone and Zone, estimates of population within 75 miles of the Sub-zone and Zone boundaries have been prepared. These are presented in Table D-2 and illustrated in Chart D-1. This data emphasizes the strong day use potential in the eastern portion of both Zones.

The existing and projected population of the larger market area has been documented in Table D-3. The distribution points out the size and growth of the major markets within weekend travel range of the Zones. These markets presently do not contribute large numbers of visitors to the Zones.

**CHART D-1
POPULATION WITHIN
ONE HOUR'S DRIVE
(DAY TRIPS)**

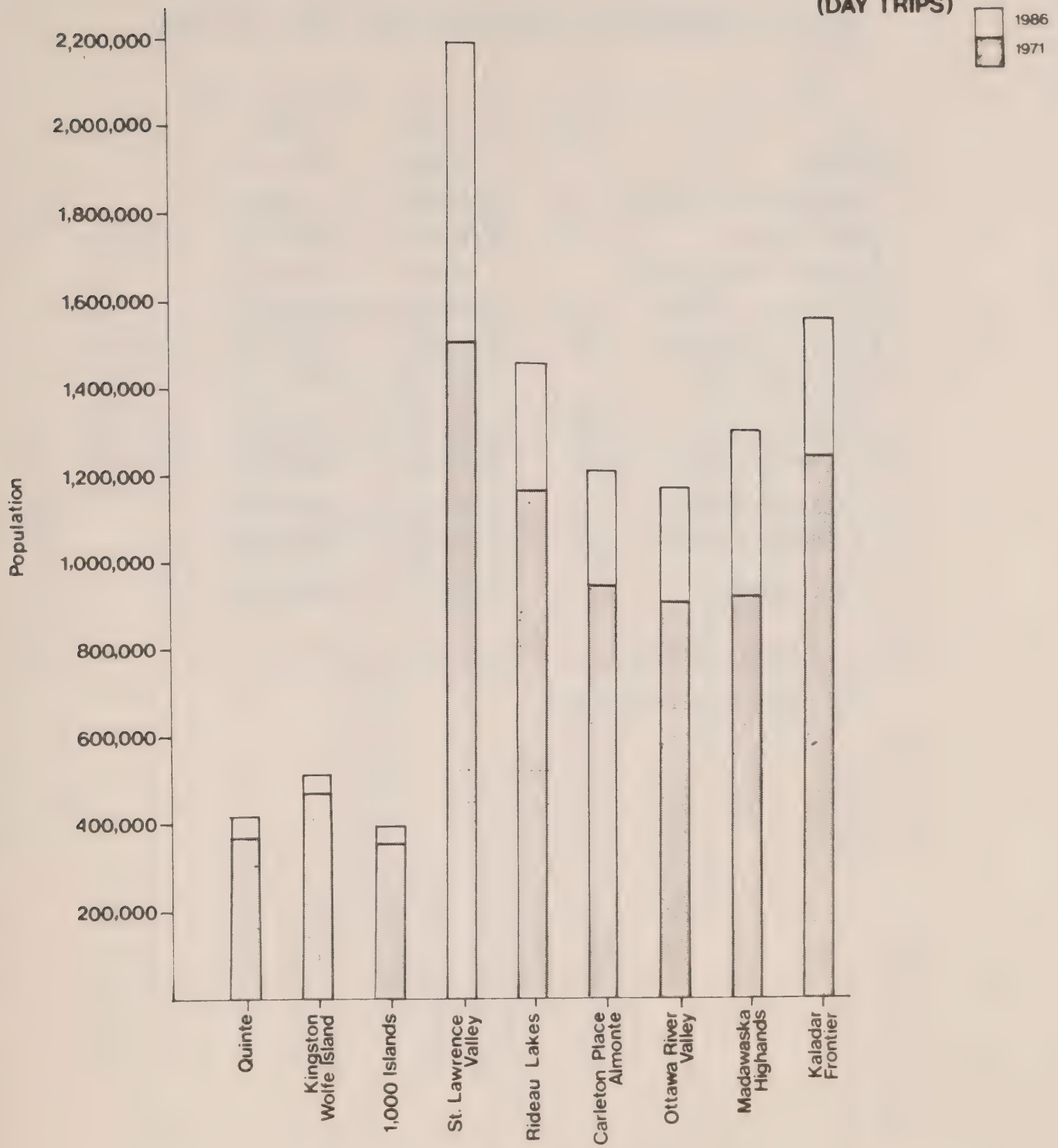


TABLE D-2 POPULATION WITHIN ONE-TWO HOUR'S DRIVE (75 MILES)

	<u>1971</u>	<u>1986</u>
Quinte	370,000	420,000
Kingston/Wolfe Island	460,000	510,000
Rideau Lakes	1,180,000	1,470,000
Carleton Place/Almonte	940,000	1,210,000
Ottawa River Valley	900,000	1,170,000
Madawaska Highlands	900,000	1,290,000
Kaladar Frontier	1,240,000	1,550,000
Thousand Islands	360,000	400,000
St. Lawrence Valley	<u>1,500,000</u>	<u>2,200,000</u>
TRENTON/CORNWALL	1,870,000	2,620,000
RENFREW/KINGSTON	1,220,000	1,600,000
Both Zones	2,300,000	3,060,000

Note: Sub-zones do not add due to overlap

Source: See Table D-3.

TABLE D-3 MARKET AREA POPULATION

Area	Population (thousands)				
	1971	1974	1981	1986	1991
Eastern Ontario	951	982	1,079 ¹	1,176	1,273 ²
Lake Ontario	347	359	383 ¹	406	432 ²
Central Ontario	2,898	2,991	3,456 ¹	3,921	4,383 ²
Outaouais Region - Western Quebec	243	256 ³	287	312 ²	337
Montreal Region	3,423	3,565 ³	3,895	4,154 ²	4,413
Michigan, New York, Ohio, Pennsylvania	49,985	50,870	53,875	56,005 ²	58,134
TOTAL MARKET AREA POPULATION	57,847	59,023	62,975	65,974	68,972

- Notes: 1. Extrapolated at 1.09% for data presented as 1980.
2. Averaged between 10 years.
3. Extrapolated between 1971 and 1981.

Source: Ontario Projections: "Ontario's Changing Population, Vol. 2, Directions and Impact of Future Change 1971-2001". Ministry of Treasury, Economics & Intergovernmental Affairs, Ont. 1976.
Quebec Projections: "Main Street - Windsor to Quebec City", Yeates, Maurice, 1975.
U.S. Projections: "Area Economic Projections, 1991", U.S. Department of Commerce.

3. Total Trips/Social, Recreational and Other Personal Trips

The significant growth in trips by automobile to the Zones will continue to be the major tourist market. This growth has been documented by Sub-zone in Tables D-4 and D-5 for total trips and for social, recreational and other personal trips. As well as the high annual growth rate of particular Sub-zones such as Carleton Place/Almonte, the relative volume of trips to particularly the Quinte, Kingston/Wolfe Island and St. Lawrence Valley represents major tourist flows.

TABLE D-4 TOTAL TRAVEL BY AUTOMOBILE¹

<u>Destination</u>	<u>Person Trips (000's)³</u>		
	<u>1974</u>	<u>1991</u>	<u>% Increase (annual)</u>
Quinte	16,000	28,900	3.5
Kingston/Wolfe Island	13,300	23,100	3.3
Rideau Lakes	8,400	13,900	3.0
Carleton Place/Almonte	8,900	18,700	4.4
Ottawa River Valley/ Madawaska Highlands	4,400	7,600	3.3
Kaladar Frontier	4,000	5,500	1.8
Thousand Islands	3,500	4,900	2.0
St. Lawrence Valley	11,300	16,900	2.3
TRENTON/CORNWALL	23,100	38,860	3.1
RENFREW/KINGSTON	<u>22,400</u>	<u>45,700</u>	<u>4.3</u>
TOTAL ZONES ²	28,800	55,100	3.9

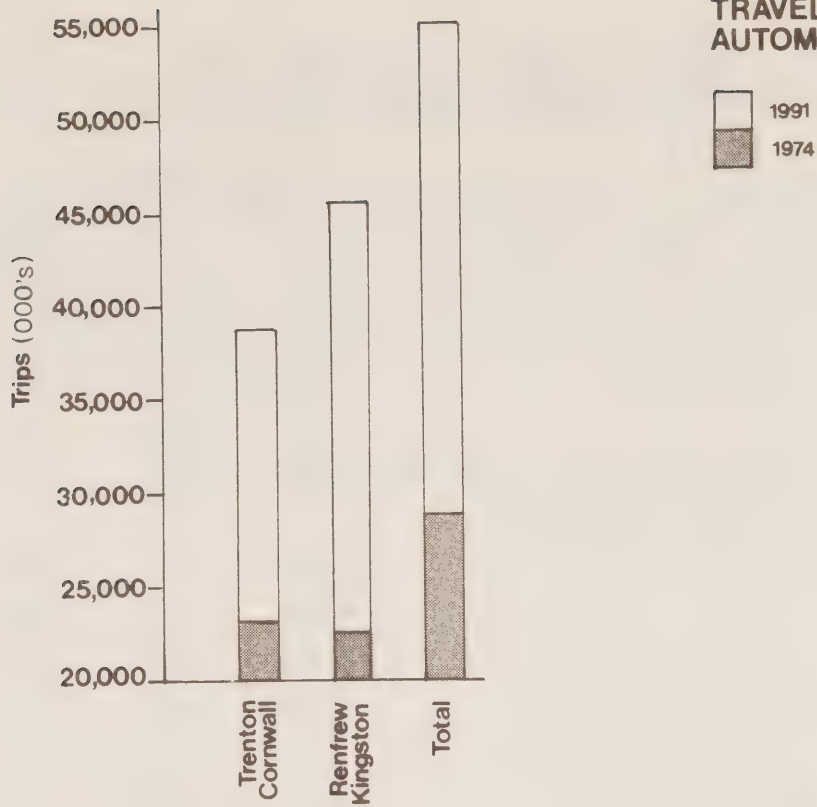
- Notes: 1. Based on origin/destination studies compiled by the Ontario Ministry of Transportation and Communications up to and including 1974.
2. Does not include internal trips, i.e., Sub-zone trips do not add.
3. The number of person trips was obtained by multiplying the estimated annual number of vehicles by a factor of 2.35.

TABLE D-5 SOCIAL, RECREATIONAL AND
OTHER PERSONAL TRAVEL BY AUTOMOBILE

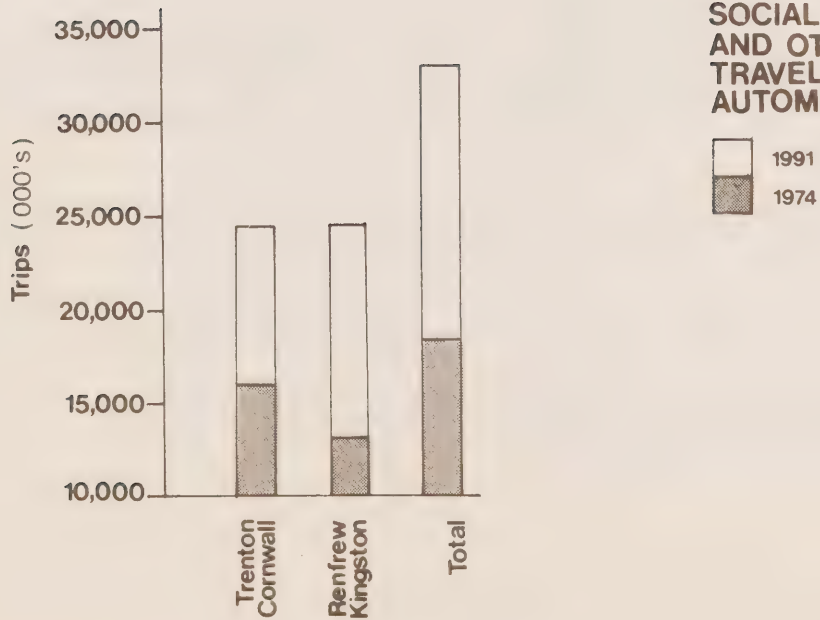
<u>Destination</u>	<u>Person Trips (000's)³</u>		<u>% Increase (Annual)</u>
	<u>1974</u>	<u>1991</u>	
Quinte	9,048	14,805	2.9
Kingston/Wolfe Island	6,700	11,600	3.3
Rideau Lakes	5,200	9,000	3.3
Carleton Place/Almonte	4,600	9,500	4.3
Ottawa River Valley/Madawaska Highlands	2,200	4,000	3.6
Kaladar Frontier	2,800	3,900	2.0
Thousand Islands	2,200	3,200	2.2
St. Lawrence Valley	8,200	11,900	2.2
TRENTON/CORNWALL	16,000	24,400	2.5
RENFREW/KINGSTON	13,100	24,500	3.8
Both Zones ²	18,100	33,100	3.6

- Notes: 1. Based on origin/destination studies compiled by the Ontario Ministry of Transportation and Communications up to and including 1974.
2. Does not include internal trips (i.e., Sub-zone trips do not add)
3. The number of person trips was obtained by multiplying the estimated annual number of vehicles by a factor of 2.35.

**CHART D-2
TRAVEL BY
AUTOMOBILE**



**CHART D-3
SOCIAL, RECREATION
AND OTHER PERSONAL
TRAVEL BY
AUTOMOBILE**



4. Tourism Expenditures

Expenditures in the Zone have been estimated for all tourists, except for Ontario residents by the Ontario Ministry of Industry and Tourism. These expenditures totalled \$140.3 million in 1973-74 based on the following:

	<u>TRENTON/CORNWALL</u>	<u>RENFREW/KINGSTON</u>	<u>TOTAL</u>
Ontario weekend and vacation visitors	\$ 35,734,000	\$ 10,905,000	\$ 46,639,000
Residents of other provinces	43,993,000	7,000,000	50,993,000
U.S. visitors	37,463,000	5,202,000	42,665,000
	<hr/>	<hr/>	<hr/>
TOTAL	\$117,190,000	\$ 23,107,000	\$140,297,000

5. Geographical Origin of Tourists

Table D-6 shows the distribution of the social, recreational and other personal trips to the Zones by origin. Over fifty percent of these trips originate in Ottawa/Hull and the rest of Eastern Ontario with a heavy concentration in the rest of Eastern Ontario.

TABLE D-6 SOCIAL, RECREATIONAL, AND OTHER
PERSONAL TRAVEL BY AUTOMOBILE, BY ORIGIN*

<u>Origin</u>	<u>TRENTON/CORNWALL</u>		<u>RENFREW/KINGSTON</u>	
	<u>Annual Number of Visitors</u>		<u>Annual Number of Visitors</u>	
Ottawa/Hull	1,119,000	7%	4,487,000	34%
Rest of Eastern Ontario	7,231,000	45%	6,713,000	51%
Southern Ontario	4,779,000	30%	1,129,000	9%
Eastern U.S.	1,424,000	9%	321,000	2%
Montreal	1,099,000	7%	120,000	less than 1%
Other Canadian	270,000	less than 2%	221,000	less than 2%
Other U.S.	93,000	less than 1%	62,000	less than 1%
Total	16,015,000	100%	13,059,000	100%

- * Derived from vehicle origin/destination studies compiled by the Ontario Ministry of Transportation and Communications up to and including 1974. The number of visitors was obtained by multiplying the estimated annual number vehicles for these social, recreational and other personal trip purposes by a factor of 2.35 people per vehicle and the estimated annual number of vehicles for all trip purposes by a factor of 2.0 people per vehicle.

The 8.35 and 11.2 million person trips to the Trenton/Cornwall & Renfrew/Kingston Zones respectively from Eastern Ontario (Ottawa-Hull and the rest of Eastern Ontario) plus a large number of the visitors from upper New York State, constitute the main day use market for tourism-oriented facilities and services. While a high proportion of the Canadian trips are likely to be made to urban centres from adjacent areas outside the Zone to shop and visit friends and relatives, others will cover the full range of tourism/outdoor recreation activities.

Residents of Southern Ontario make 30 per cent (4.8 million) of the social, recreational and other personal trips to the Trenton/Cornwall Zone, but only 9% to the Renfrew/Kingston Zone. This difference is primarily a factor of distance and, as such, many of these are in the form of weekend and vacation trips. Outside of Ontario, the single large groups of visitors are from the Eastern United States, primarily New York State.

A preliminary analysis of the Ontario Recreation Survey indicated that there were more than 1.2 and 1.1 million overnight weekend and vacation trips made to the Trenton/Cornwall Zone and the Renfrew/Kingston Zone by Ontario residents in 1975 (see Table D-7). The Lake Ontario and Central Ontario Areas contribute heavily to the vacation population of both Zones. In view of the relatively small population of Northern Ontario, a high proportion of them visit the Zone, compared with Southwestern Ontario.

Analysis of U.S. residents visiting the Zones indicates that a high percentage come from New York State (see Table D-8). The United States market is almost as important to the Trenton/Cornwall Zone as that of Montreal.

TABLE D-7 WEEKEND AND VACATION TRIPS BY
ORIGINS OF ONTARIO RESIDENTS

<u>TRENTON/CORNWALL ZONE*</u>						
<u>Origin</u>	<u>Weekend</u> <u>Trips</u>	<u>%</u>	<u>Vacation</u> <u>Trips</u>	<u>%</u>	<u>Total</u>	<u>%</u>
Eastern Ontario	205,460	18	26,050	24	231,510	19
Lake Ontario & Central Ontario	632,930	57	38,110	36	671,040	55
Niagara, Lake Erie Lake St. Clair, Midwest Ontario	138,800	12	18,180	17	156,980	13
NE Ontario						
NW Ontario						
Georgian Bay	13,750	1	16,920	16	30,670	3
Ottawa**	96,200	9	7,400	7	103,600	8
Kingston**	25,520	2	-	-	25,520	2
TRENTON/CORNWALL	1,112,660	100	106,660	100	1,219,320	100
<u>RENFREW/KINGSTON ZONE*</u>						
Eastern Ontario	257,984	26	37,088	24	295,072	26
Lake Ontario & Central Ontario	283,554	29	46,283	30	329,837	29
Niagara, Lake Erie Lake St. Clair, Midwest Ontario	8,538	>1	9,508	6	18,046	2
NE Ontario						
NW Ontario						
Georgian Bay	31,871	3	8,991	6	40,862	4
Ottawa**	332,401	34	44,409	28	376,810	33
Kingston**	68,096	7	9,851	6	77,947	7
RENFREW/KINGSTON	982,444	100	156,130	100	1,138,574	100

* Based on the 1975 population of Ontario.

** Information uncertain at the city level.

Source: Ontario Recreation Survey, 1974-75

TABLE D-8 ORIGINS OF UNITED STATES VISITORS TO THE ZONES 1973-74

<u>Origins</u>	<u>TRENTON/CORNWALL</u>			<u>RENFREW/KINGSTON</u>		
	<u>No. of Parties Total Year</u>	<u>%</u>	<u>Rank</u>	<u>No. of Parties Total Year</u>	<u>%</u>	<u>Rank</u>
Michigan	11,800	3	5	4,500	5	5
New York	286,100 (629,420 people)	72	1	54,700	54	1
Ohio	13,300	3	4	9,100	9	4
Penn.	36,700	9	3	18,800	19	2
Illinois	900	1	6	1,600	2	6
Rest of U.S.	48,200	12	2	11,300	11	3
TOTAL U.S.	397,000 (873,400 people)	100		100,000 (221,000 people)	100	

Source: 1974 U.S. Auto Exit Survey Data

6. Mode of Travel

A preliminary analysis of early data obtained from the Ontario Recreation Survey enables us to establish a profile of Ontario residents visiting the Zones on weekends and vacations. Table D-9 shows the relative importance of different modes of travel by the visitors. The most significant feature is the prominence of automobile travel.

TABLE D-9 TRANSPORTATION MODE

	<u>TRENTON/CORNWALL</u>		<u>RENFREW/KINGSTON</u>	
	<u>Weekend%</u>	<u>Vacation%</u>	<u>Weekend%</u>	<u>Vacation%</u>
Automobile	89	85	94	75
Rail	3	5	-	3
Bus	2	3	3	9
Air	-	-	-	-
Boat	2	3	2	7
Other	4	4	1	6
	100%	100%	100%	100%

7. Activities

Weekend activities are shown in Table D-10. The importance of friends and relatives as an attracting feature for Zone visitors stands out sharply (see also Table D-13 Accommodation). Aside from this category, water-oriented activities, including cottaging, fishing, motor boating, and sailing make up 20% of the weekend activities.

The pattern of vacation activities differs from that of weekend activities. Cottaging becomes the primary focus, with friends and relatives as the second most important category. Aside from more emphasis on shopping in the Trenton/Cornwall Zone, people on vacation appear to be more oriented to outdoor recreation activity than is the case with weekend visitors.

TABLE D-10 ACTIVITIES

	<u>TRENTON/CORNWALL</u>		<u>RENFREW/KINGSTON</u>	
	<u>Weekend</u>	<u>Vacation</u>	<u>Weekend</u>	<u>Vacation</u>
Visiting friends and relatives	53%	30%	37%	26%
Recreational driving and touring	9	6	3	2
Cottaging	9	32	19	32
Fishing	7	4	11	10
Shopping	6	13	5	--
Camping	5	6	6	--
Motor Boating	3	4	7	10
Hunting	--	--	--	7

More than 873,000 U.S. residents visited the Trenton/Cornwall Zone and 221,000 visited the Renfrew/Kingston Zone in 1973-74, according to the U.S. Auto Exit Survey. The main reasons for their visits, covering 88% of the parties, are shown in Table D-11. As with Ontario residents, the major categories of interest to U.S. residents are visiting friends and relatives.

TABLE D-11 MAIN REASONS FOR VISITING ONTARIO

Reason	TRENTON/CORNWALL	RENFREW/KINGSTON
	Percent	Percent
Visit friends or relatives	24	26
Other non-business reasons	12	--
Stay at own cottage	10	13
Outdoor recreation activities	10	15
Shopping	8	--
Vacation at Ontario resort/ cottage	8	14
Tour Ontario countryside	--	10
Other	<u>28</u>	<u>22</u>
	100	100

Activities of U.S. visitors are strongly water oriented. Table D-12 lists the six main activities, in order of participation.

TABLE D-12 MAIN ACTIVITIES OF U.S. RESIDENTS
VISITING THE ZONE

Activity	TRENTON/CORNWALL	RENFREW/KINGSTON
	Percent	Percent
Shopping for gifts or souvenirs	22	--
Fishing	20	20
Swimming	18	19
Motor Boating	16	19
Nature Study	4	8
Picnicking	4	7
Water skiing	--	6
Other	<u>16</u>	<u>21</u>
	100	100

8. Accommodation Used and Length of Stay

Notable differences exist between weekend and vacation visitors in their choice of accommodation (Table D-13). A high proportion of the weekend nights are spent with friends and relatives in the Renfrew/Kingston Zone. This form of accommodation is also important for vacation visitors. Cottage-type accommodation is the second most often used type of accommodation. Vacationers in the Trenton/Cornwall Zone use tent/trailer/mobile home accommodation almost three times as often as weekend visitors, whereas in the Renfrew/Kingston Zone, the opposite is the case.

TABLE D-13 ACCOMMODATION USED

<u>Type</u>	<u>TRENTON/CORNWALL</u>		<u>RENFREW/KINGSTON</u>	
	<u>Weekend</u>	<u>Vacation</u>	<u>Weekend</u>	<u>Vacation</u>
	<u>(%)</u>		<u>(%)</u>	
Hotel/Motel/Resort/Lodge	12	8	3	1
Cottaging/Chalet/Hobby Farm	15	37	42	48
Home of friend or relative	58	23	42	40
Tent/Trailer/Mobile Home	10	29	13	6
Other	<u>5</u>	<u>3</u>	<u>0</u>	<u>5</u>
	100	100	100	100

Length of stay by Ontario residents in the Zones indicates that weekend visitors tend to take long weekends, and that vacationers do not spend their entire vacation in the Zone (Table D-14). The overlapping between the two groups in the 4-6 night category highlights the growing importance of the mini-vacation in our society, where people are increasingly breaking up their annual vacation into two or three short vacations at different periods in the year. Eight to eighty-five percent of the vacations are in the categories of staying one week or less in the Zones, with two-thirds or more of the total nights in the two categories of one week and less than one week (4-7 nights).

TABLE D-14 LENGTH OF STAY

<u>Type</u>	<u>TRENTON/CORNWALL</u>		<u>RENFREW/KINGSTON</u>	
	<u>Weekend</u>	<u>Vacation</u>	<u>Weekend</u>	<u>Vacation</u>
	<u>(%)</u>		<u>(%)</u>	
1 night	31	--	29	--
2 nights	42	7	39	3
3 nights	21	6	16	--
4-5 nights	6	32	16	29
1 week	--	34	--	57
2 weeks	--	16	--	11
3 weeks	--	5	--	--
	<u>100</u>	<u>100</u>	<u>100</u>	<u>100</u>

Use of accommodations by U.S. visitors is shown in Table D-15. Rented and owned cottages account for more than half of all party nights, suggesting a strong vacation orientation which is reflected in Table D-16. There is also a greater incidence of use of hotel/motel and similar facilities than was true of Ontario residents, which probably reflects the higher incomes of the U.S. visitors than their Ontario counterparts.

TABLE D-15 ACCOMMODATION USED BY U.S. VISITORS

<u>Type</u>	<u>TRENTON/CORNWALL</u>	<u>RENFREW/KINGSTON</u>
	<u>Percent</u>	<u>Percent</u>
Own cottage	24	16
Rented cottage/cabin	23	37
Trailer park/campsite	18	12
Friends/relatives	18	19
Hotel/Motel/Resort/Lodge	11	12
Outfitter/Hotel/Other	<u>5</u>	<u>6</u>
	100	100

The most important feature concerning the length of stay of U.S. visitors (Table D-16) is that 50% of the U.S. residents in the Trenton/Cornwall Zone were transient visitors who did not stay overnight in the Zone. The U.S. visitor to the Trenton/Cornwall Zone appears to be more transient than those coming to the Renfrew/Kingston Zone.

TABLE D-16 LENGTH OF STAY

Period	TRENTON/CORNWALL	RENFREW/KINGSTON
	Percent	Percent
0 night	49	23
1 night	7	8
2 nights	9	13
3 nights	10	10
4 or more nights	<u>25</u>	<u>46</u>
	100	100

9. Party Composition

Party composition among Ontario residents visiting the Zones reflects the importance of families with children, particularly among vacationers (Table D-17). The difference between the party composition of weekend and vacation visitors is primarily in lower number of families with children visiting on weekends and the relatively larger number of people without children visiting on weekends rather than on vacation.

TABLE D-17 PARTY COMPOSITION

	TRENTON/CORNWALL		RENFREW/KINGSTON	
	Weekend (%)	Vacation (%)	Weekend (%)	Vacation (%)
Single person	14	10	13	13
1 family with children	39	46	39	57
2 families with children	1	5	2	4
Organized group	--	6	7	3
1 couple only	21	17	19	4
2 or more couples	5	4	1	1
With a friend or friends	14	12	11	17
Other	<u>6</u>	<u>--</u>	<u>8</u>	<u>--</u>
	100	100	100	100

B. MARKET PROFILES*

Both Zones serve five major markets, in addition to the internal population. These markets are:

Eastern Ontario
Ottawa-Hull
Toronto
Montreal
New York State

The relationships between these markets and the two Zones in terms of distance and the implications for competing tourism opportunities are shown on Map No. D-1 and D-2. A brief profile of each of the major markets is outlined below.

1. Eastern Ontario

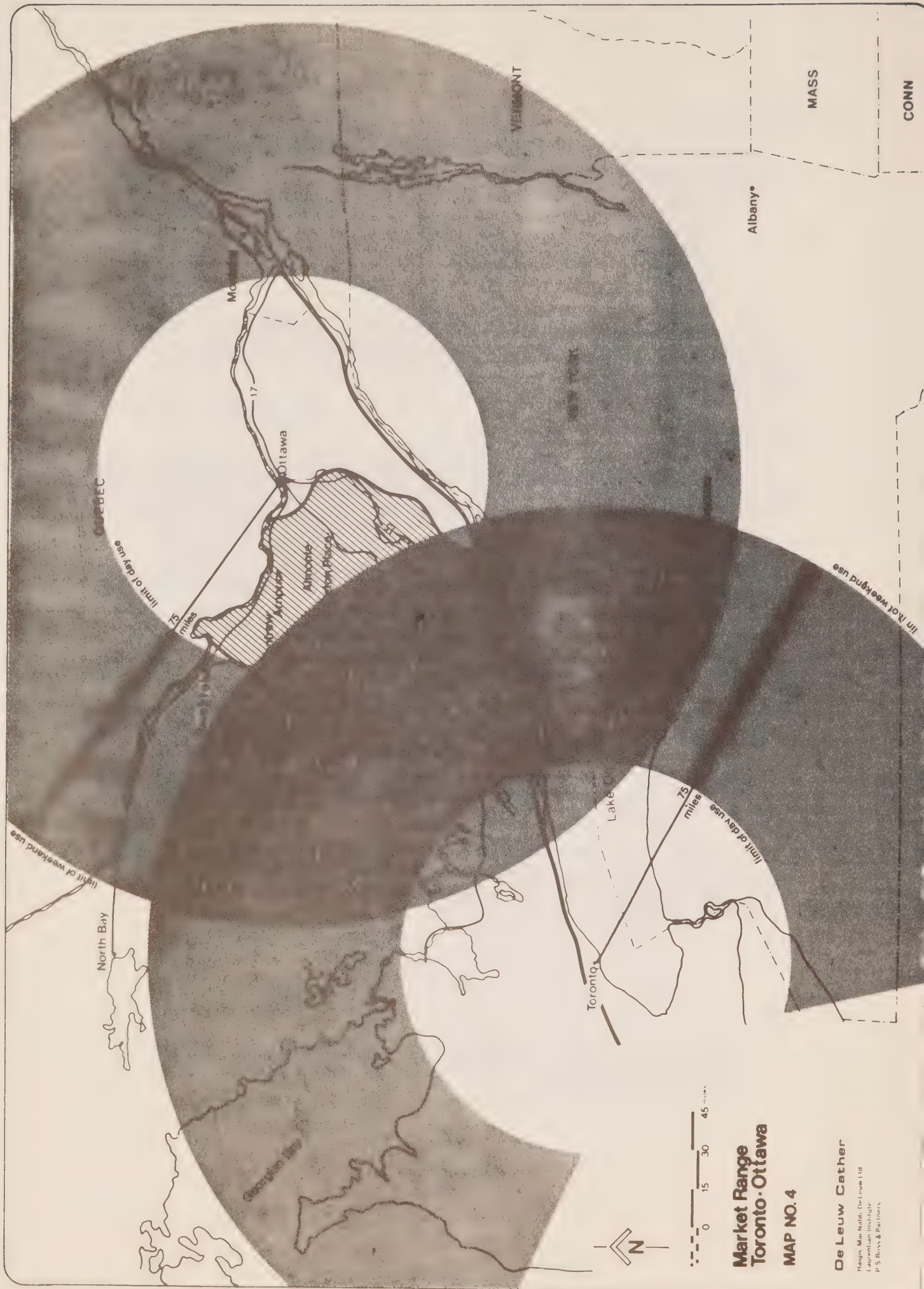
Excluding the population of the Regional Municipality of Ottawa-Carleton, the remaining population of Eastern Ontario is in the order of 400,000 people. The majority of these people are within day-use driving distance of at least part of each Zone.

There were 6.0 million social, recreational and personal person trips to the Trenton/Cornwall Zone by residents of Eastern Ontario in 1974, and 2.5 million such trips to the Renfrew/Kingston Zone. Destination by Sub-zone, and projected person trips to 1991 are shown in Table D-18 based on Ontario Ministry of Transportation and Communications projections.

A combination of strong social ties, swimming and boating, camping opportunities and shopping make the Zones attractive to surrounding area residents. The Zones also benefit from the general lack of strong competing opportunities within easy access, particularly for people living close to the Zones. Both the Ottawa and St. Lawrence River act as barriers in this regard.

The major competing opportunities are the shopping and cultural facilities in Ottawa; skiing and cottaging opportunities in Western Quebec; and the outdoor recreation and tourism facilities in Upper New York State.

* Population and income information for the Ottawa-Hull, Toronto, Montreal and New York markets is derived from Sales and Marketing Management, 1976 Survey.



Market Range Toronto-Ottawa

MAP NO. 4

De Leuw Cather

Hughes, MacRae, De Leuw Ltd
Laurentian Institute
P. S. Ryan & Partners



North Bay

Pembroke

ONTARIO

Georgian Bay

Toronto

Syracuse

Montreal

**Market Range
Montreal-Syracuse**

MAP NO. 5

De Leuw Cather

Planners, Map Makers, Designers Ltd.

1000 Lakeshore Blvd. W.
Toronto, Ontario M6H 1A5

TABLE D-18 SOCIAL, RECREATIONAL, AND PERSONAL TRIPS
TO THE ZONES BY RESIDENTS
OF EASTERN ONTARIO, 1974 AND 1991

Origin	TRENTON/CORNWALL		
	Desination	1974 (millions)	1991 (millions)
East of Ottawa	St.Lawrence Valley*	2.6	3.6
Rideau Area	Gananoque	0.2	0.2
Kaladar Rideau	Kingston	2.3	3.4
N.Hastings/Kaladar area	Quinte	<u>0.9</u>	<u>1.3</u>
	Trenton/Cornwall	6.0	8.5
	RENFREW/KINGSTON		
East of Ottawa	Rideau Lakes	0.7	0.9
Brockville/Prescott/ Gananoque	Rideau Lakes	0.6	0.9
Brockville/Prescott/ Gananoque	Kingston	1.0	1.7
Pembroke Area	Madawaska/Ottawa		
	River Valley	<u>0.2</u>	<u>0.4</u>
	Renfrew/Kingston	2.5	2.9

Source: MTC Traffic Projections, 1974

2. Ottawa-Hull

The population of the Ottawa-Hull census metropolitan area was about 486,000 people in 1975, containing some 137,000 households. Nearly 81,000 households have disposable incomes of \$10,000 or more (the highest proportion of households among Canadian census metropolitan areas).

Per capita participation rates in recreation activities by residents of Ottawa are shown below in relation to provincial averages, as established by the Ontario Recreation Survey.

* Includes Brockville

Higher Per Capita Participation Rates Than Provincial Average

- Visiting private cottage/chalet/hobby farm*
- Attending live theatre*
- Water skiing*
- Swimming
- Visiting museum or art gallery
- Boating
- Downhill skiing
- Cross country skiing and snowshoeing

Lower Per Capita Participation Rates Than Provincial Average

- Recreational driving**
- Attending spectator sports**
- Camping**
- Snowmobiling**
- Golf**
- Hunting

Ottawa residents show a strong preference for cottage-type facilities, water oriented activities, and skiing, as well as cultural activities. While in part this reflects the supply situation, the latter does not explain the low levels of participation in other outdoor recreation activities, such as attending spectator sports, camping, snowmobiling or golfing, for which there is an adequate area supply. These lower than average participation rates reflect the nature of this particular high income market, dominated by government employment. Similar observations have been made in Reston, Virginia.***

Major demand for cottages on the part of Ottawa-Hull residents has been met in the Rideau Lakes, Thousand Islands, Madawaska Highlands, Kaladar Frontier, and western Quebec. Until recently, the most rapid growth area in this regard has been in the Gatineau area north of Ottawa-Hull.

Hobby farms and rural property have also been in demand in the same areas, as well as south and east of Ottawa. Day use driving distance appears to be a major consideration in the purchase of property by Ottawa-Hull residents.

Other characteristics of this market area include:

- Rapid growth of fitness sports such as tennis, bicycling, hiking, sailing, canoeing and kayaking, as shown by retail sales.
- Continuing demand for training and meeting facilities for use by government agencies, associations, and companies.

The market characteristics, together with strong sales to area residents of condominiums in the Cantraccon destination resort at Mont Ste-Marie, Quebec, suggest additional potential in this market for year-round destination-type resort facilities.

* Considerably higher than provincial average

** Considerably lower than provincial average

*** Tomorrow's Leisure Today: A New Town Study
Leisure Today, Washington, D.C., Oct. 1976, pp. 27-28

Person trips to the Trenton/Cornwall Zone from the Ottawa-Hull area for social, recreational, and personal reasons amounted to 1.13 million in 1974 and are projected to 1.85 million by 1991. Person trips to the Renfrew/Kingston Zone from the Ottawa-Hull area for social, recreational and personal reasons amounted to 4.5 million in 1974 and are projected to 10.8 million by 1991. The distribution of these trips by Sub-zone are shown in Table D-19.

TABLE D-19
SOCIAL, RECREATIONAL, AND PERSONAL TRIPS
TO THE ZONES BY RESIDENTS OF OTTAWA-HULL,
1974 AND 1991

<u>Sub-zone Destination</u>	<u>1974</u> (million)	<u>1991</u> (million)
St. Lawrence Valley (includes Brockville)	0.9	1.3
Thousand Islands	0.03	0.05
Kingston	0.1	0.3
Quinte	<u>0.1</u>	<u>0.2</u>
Trenton-Cornwall	1.13	1.85
Kingston	0.1	0.3
Rideau Lakes	1.1	3.0
Kaladar/Carleton Place/Almonte	2.1	5.4
Madawaska/Ottawa River Valley	<u>1.2</u>	<u>2.1</u>
Renfrew-Kingston	4.5	10.8

3. Toronto

While Toronto has been designated as a major market area for the Zone, it is in fact the central part of a much larger market area for the Zone, stretching from Hamilton to Peterborough.

The population of the Toronto census metropolitan area was more than 2.8 million people in 1975. There were 471,000 households with an average disposable income of approximately \$16,000. In excess of 850,000 households had disposable incomes of \$10,000 or more, which is the third highest percentage in Canada.

Per capita participation rates in recreation activities by Toronto residents are shown below in relation to provincial averages as established by the Ontario Recreation Survey.

Higher Per Capita Participation Rates Than Provincial Average

- Tennis*
- Water skiing*
- Visiting a private cottage/chalet/hobby farm
- Attending live theatre
- Visiting museum or art gallery
- Boating

Lower Per Capita Participation Rates Than Provincial Average

- Fishing**
- Snowmobiling**
- Hunting**
- Recreational driving
- Attending spectator sports
- Recreational cycling
- Camping
- Horseback riding

Toronto residents show some preference for water-oriented activities, and cottage-type facilities, which is reflected in the continuing demand for cottages on lakes and rivers in Muskoka, Parry Sound, Haliburton, and Kawartha Lakes. Lower-than-average participation rates in the outdoor recreation activities listed may in fact suggest a shortage of opportunities within reasonable day use distance, as well as cost factors.

Growth in the Toronto region has created accessibility problems because of both distance to opportunities and traffic conditions. These are negative factors affecting day trips and weekend trips. The additional day on a long weekend (particularly in summer) brings substantial increases in traffic, suggesting that 3 and 4 day weekends or mini-vacations will be required to attract larger numbers of people from this market to the Trenton/Cornwall and Renfrew/Kingston Zones. Small numbers of Toronto cottagers already are located in the Kaladar Frontier and Rideau Lakes. Rural property, particularly in Prince Edward County, has been experiencing heavy pressure from Toronto residents seeking second homes.

Other characteristics of the Toronto area market are:

- rapid growth in fitness sports including tennis, downhill and cross country skiing, hiking, sailing, canoeing, and kayaking, as shown by retail sales;
- continuing demand for hobby farms and rural properties suitable for retirement;
- a growing eastward orientation to satisfy outdoor recreation needs, result from heavy use pressures in traditional areas west, north and north east of Toronto;
- continuing private and government demand for good quality meeting and training facilities outside of major urban centres.

Person trips from the Toronto/Hamilton/Niagara/Lake Simcoe areas to the Trenton/Cornwall Zone for non-business purposes amounted to more than 1.9 million in 1974, and are projected to increase to about 2.3 million by 1991.

* Considerably higher than provincial average.

** Considerably lower than provincial average.

Trips of a similar nature amounted to more than 733,000 trips to Renfrew/Kingston zone in 1974 and these types of trips are projected to increase to about 1.4 million by 1991 in this Zone. Distribution of trip destinations within the Zone are shown in Table D-20.

TABLE D-20
SOCIAL RECREATIONAL AND PERSONAL TRIPS
TO THE ZONES BY TORONTO
AND AREA RESIDENTS, 1974 AND 1991

<u>Sub-zone Destination</u>	1974	1991
Quinte	900,000	1,200,000
Kingston	500,000	600,000
Thousand Islands	200,000	200,000
St. Lawrence Valley (includes Brockville)	<u>300,000</u>	<u>300,000</u>
Trenton-Cornwall	1,900,000	2,300,000
Kingston	452,000	906,000
Rideau Lakes	68,000	111,000
Kaladar/Carleton Place/Almonte	190,000	329,000
Madawaska/Ottawa River Valley	<u>23,000</u>	<u>43,000</u>
Renfrew/Kingston	733,000	1,389,000

4. Montreal

The population of the Montreal census metropolitan area was estimated to be almost 2.9 million people in 1975, containing about 855,000 households. Average household disposable income was more than \$14,000, with 388,000 households having \$10,000 or more.

The Montreal area is well equipped with social, cultural and recreational facilities, including two major theme parks (Belmont and La Ronde), outdoor recreation and tourism facilities within day use and weekend driving distances on a year round basis in the Laurentians, Eastern Townships, Vermont, and Northern New York. Also, many Montrealers traditionally vacation along the Atlantic coast in Maine.

Increasing population and development pressures in some of the traditional playground areas, together with vastly improved highway connections to Ontario, have resulted in more Montrealers visiting Eastern Ontario. The Trenton/Cornwall one is within day use and weekend driving from Montreal. (See map D-2) The Renfrew/Kingston Zone is farther away but is nearly all within weekend driving distance.

More than a million person trips were made from Montreal to the Trenton/Cornwall Zone in 1974. The projected figure for 1991 is more than 2 million. About 120,000 person trips were made from Montreal to the Renfrew/Kingston Zone in 1974. The projected figure for 1991 is almost 190,000. The distribution of these trips by Sub-zone is shown in Table D-21.

TABLE D-21
SOCIAL RECREATIONAL AND PERSONAL TRIPS
TO THE ZONES BY MONTREAL RESIDENTS, 1974 AND 1991

<u>Sub-zone Destination</u>	<u>1974</u>	<u>1991</u>
St. Lawrence Valley (includes Brockville)	944,000	1,811,000
Thousand Islands	58,000	99,000
Kingston	31,000	47,000
Quinte	65,000	115,000
Trenton/Cornwall	1,098,000	2,072,000
<hr/>		
Kingston	31,000	47,000
Rideau Lakes	33,000	54,000
Kaladar/Carleton Place/Almonte	41,000	68,000
Madawaska/Ottawa River Valley	15,000	21,000
Renfrew/Kingston	120,000	190,000

Changes in participation in outdoor recreation activities by Quebecers between 1975 and 1980 have been estimated and ranked according to their importance. Eleven activities selected as being relevant to the Zones are shown below. They represent potential areas of growth in some of the most popular activities of the Quebec population as a whole.

<u>Rank</u>	<u>Activity</u>	<u>Percentage Change</u>
1	Driving for pleasure	+ 6%
2	Picnicking	+ 7%
3	Swimming	+ 9%
4	Hiking	+10%
5	Park visits	+ 9%
6	Visiting historic sites	+10%
7	Visit as a tourist	+ 7%
9	Fishing	+ 3%
12	Power boating	+ 9%
13	Tenting	+ 8%
19	Trailer camping	+ 8%

5. New York State

The larger proportion of the U.S. visitors to the Zones comes from New York State. Four metropolitan areas are well within weekend driving distance of most of Trenton/Cornwall Zone and the Rideau Lakes Sub-zone of the Renfrew/Kingston Zone. They are Syracuse, Rochester, Utica-Rome and Albany-Schenectady-Troy. Syracuse, Rochester and Utica-Rome are within weekend driving distance for much of the remaining Renfrew/Kingston Zone.

Some economic characteristics of these metropolitan areas are shown in Table D-22 below. These four areas represent a market about the size of Toronto or Montreal; however, one of the important differences is that there are proportionally more higher income households in the New York State cities than in the Canadian ones.

TABLE D-22

ECONOMIC PROFILE OF FOUR METROPOLITAN AREAS IN NEW YORK STATE

<u>Area</u>	<u>Population (000)</u>	<u>Households (000)</u>	<u>Median Disposable Income</u>	<u>% Households \$10,000 +</u>
Albany-Schenectady- Troy	797	277	14,000	68
Rochester	974	322	15,000	72
Syracuse	647	211	14,000	67
Utica-Rome	339	112	12,000	60
	2,758	922		

Up-state New York residents have extensive outdoor recreation opportunities available to them within weekend driving distance. These include:

- Thousand Islands (U.S.)
- South Shore of Lake Ontario
- Finger Lakes
- Adirondack Mountains
- Allegany Mountains
- Atlantic Coast

There are also major historic/cultural features and events within weekend driving distance, including the \$100 million Great Adventure theme park in New Jersey.

Person trips from New York State to the Trenton/Cornwall Zone were 235,000 in 1974 and are projected to reach nearly 315,000 in 1991. The distribution of trips for social, recreational, and personal reasons by Sub-zone is shown in Table D-23 below.

Table D-23

SOCIAL, RECREATIONAL, AND PERSONAL TRIPS
TO THE ZONES BY
NEW YORK STATE RESIDENTS,* 1974 AND 1991

Sub-zone Destination	<u>1974</u>	<u>1991</u>
Quinte	55,000	105,000
Kingston	130,000	176,000
Thousand Islands	13,000	18,000
St. Lawrence Valley (includes Brockville)	<u>428,000</u>	<u>654,000</u>
Trenton/Cornwall	626,000	953,000
Kingston	130,000	176,000
Rideau Lakes	46,000	59,000
Kaladar/Carleton Place/Almonte	54,000	73,000
Madawaska/Ottawa River Valley	<u>5,000</u>	<u>7,000</u>
Renfrew/Kingston	235,000	315,000

* Excluding New York City.

C. OUTLOOK

The outlook for tourism in the Zones is derived from a number of established trends in our society and changes in patterns of tourism activity in Canada and elsewhere. These trends and patterns include population growth, population structure and labour force, income and leisure travel, and changing values in society.

1. Population Growth

The Canadian population is now about 23.5 million and is projected to increase by about 2.3 million by 1981. Between 1981 and 1991, there will be 5 million more people in Canada with the total population reaching 41 million at the turn of the century. The overall growth from 1976 to 2001 is expected to be 42%.

The Ontario population is approximately 8 million people and is expected to increase to 9.75 million by 1986. (See Table D-24). By 2001 the provincial population is expected to reach 11.5 million people. Population growth in Eastern Ontario is not expected to be as rapid as at the provincial level. There are nearly a million people in Eastern Ontario at the present time and this number is expected to increase by approximately 175,000 over the next 10 years. The population of the Trenton/Cornwall Zone is approximately 363,000 people now and is expected to reach 372,000 by 1981 and 383,000 by 1986. The population of the Renfrew/Kingston Zone is approximately 223,000 people now and is expected to reach 235,000 by 1981.

Projected population for the National Capital Region shows an anticipated increase of more than 450,000 people by 2001.*

1976	700,000
1981	773,000
1991	944,000
2001	1,156,000

While much of the employment growth will be in Western Quebec, it is anticipated that the residential growth will be east, south, and west of Ottawa.

*Projections prepared by The National Capital Commission before the federal government began its decentralization program.

Table D-24

POPULATION PROJECTION TO YEAR 2001

<u>Regions</u>	<u>1971</u>	<u>1974*</u>	<u>1986</u>	<u>2001</u>
Eastern Ontario	951	982	1,176	1,369
Lake Ontario	347	359	406	458
Central Ontario	2,898	2,991	3,921	4,848
Rest of Ontario	3,506	3,619	4,249	4,971
Total Ontario	7,702	7,950	9,752	11,646

* Calculated on the basis of 1.6% average annual rate of growth envisaged during 1971-1986 (see p. 60, Ontario's Changing Population, Vol. 2).

"Ontario's Changing Population", Ontario Ministry of Treasury, Economics and Intergovernmental Affairs, Toronto, March, 1976.

Population projections for Metropolitan Toronto/York indicate a growth of almost 19% between 1975 and 2001. It is anticipated that much of this growth will occur in an easterly direction.

1975	2,835,200
1986	2,854,500
2001	3,364,500

Projected population growth for Montreal Region and the province of Quebec is shown below.* The population in the administrative region of Montreal is expected to increase by more than 1.5 million between 1971 and 2001 (46%), while the provincial population is expected to increase by 31% over the same period.

	<u>Montreal</u>	<u>Province of Quebec</u>
1971	3,423,000	6,028,000
1981	3,895,000	6,576,000
1991	4,413,000	7,203,000
2001	4,993,000	7,918,000

The U.S. population is presently about 217 million and it is expected to increase by about another 6 million people by 1980. (See Table D-25) By 1990 it will increase by another 23 million people. In the four states of Michigan, New York, Ohio and Pennsylvania that are adjacent to Ontario, the present population is approximately 52 million and will increase by another million by 1980 and 5 million by 1990. Rates of growth in these four states are expected to be at or below the national average because of population and economic growth shifts to the south and south west. New York state is expected to have the slowest growth rate of the four states.

2. Population Structure and Labour Force

The Canadian population is undergoing structural changes that will have important implications for tourism. Two age groups will increase substantially by 1986, while two others will diminish. (See Table D-26). The 20-39 year old group will increase by more than 6% and the over 65 age group will increase by nearly 2%. The 40-64 year old group will drop very slightly, while the 0-19 year old group will diminish by nearly 8% between 1971 and 1986. These changes will also be reflected in the labour force. By 1985 this proportion will have risen to 50%. Women will account for most of the increased participation in the labour force. The increase in the number of people in the 20-39 age group together with lower birth rates indicate there will be more families

*Maurice Yeates, 1975, "Main Street" - Windsor to Quebec City, MacMillan and Co. Ltd., Toronto, Ministry of State for Urban Affairs, Information Canada, Ottawa, p. 74.

Table D-25

U.S. POPULATION PROJECTION - SELECTED AREAS TO YEAR 1990 (In Thousands)

	1971	1974* estimated	1980	1990	Average Annual Rate of Growth 1971-1980 %
Michigan	8,996	9,241	9,743	10,645	0.9
New York	18,349	18,681	19,352	20,946	0.6
Ohio	10,739	11,032	11,651	12,609	0.9
Pennsylvania	11,901	12,116	12,649	13,416	0.6
Rest of U.S.A.	156,133	160,864	170,137	188,423	1.0
Total U.S.A	206,118	211,734	223,532	246,039	0.9

Source: U.S. Department of Commerce, Area Economic Projections 1990

*1974 estimates have been derived from the calculated rates of growth (annual) between 1971 and projected 1980 population.

with fewer children. With increasing disposable income, this means more travel with less emphasis on summer vacation. With more family members and friends working, the problems of scheduling time off will result in greater emphasis on several mini vacations of 3-4 days spread over the year.

TABLE D-26 CANADIAN POPULATION STRUCTURE - 1971-86

<u>Age Group</u>	<u>% Change</u>
0 - 19	- 7.6
20 - 39	+ 6.4
40 - 64	- 0.4
65 +	+ 1.6

3. Income and Leisure

Personal disposable incomes are projected to grow at 3.5% per year in Canada, levelling off after 1986. With increasing disposable incomes and a higher proportion of the population in the labour force, more Canadians will be in the middle income category. Growth in consumer expenditures is projected to continue.

The four day work week is already a reality with a small number of firms. The four day week is projected to become more commonplace and will result in more weekend trips for those who can afford to do so while others will seek second jobs. Longer vacations and earlier retirements (in future) will make more long duration trips possible. Hobbies will become increasingly more important.

4. Changing Values

New values are being established in our society for self improvement, the appreciation and preservation of environment, as well as history and culture. These values carry an overriding concern for quality that has many implications for tourism. Greater emphasis on self improvement will result in more indoor and outdoor physical fitness activities in all age groups as well as skill-oriented experiences and acquisition of knowledge through experience. Our history and culture are becoming an increasing source of interest and enjoyment for tourists to the extent that historical sites and cultural activities are becoming increasingly important as a tourism focus in themselves. These changing values have important implications for the Zones because of the high quality, natural resource base and their preserved history and culture.

5. Travel

Travel costs are expected to continue increasing with energy costs being a major component in these increases. As a result people are becoming more cost conscious and purpose oriented in their travel. However, travel is expected to continue to grow. The following points highlight the travel outlook:

- Travel by car is increasing by about 5% per year in Canada and is projected to increase 2-3% per year in the U.S. to 1990.*
- Travel by air, bus and rail is projected to increase about 7-8% per year.*
- Travel to Canada by U.S. residents has been declining steadily for almost two years, reflecting a weak economy at home and higher vacation and travel cost in Canada than in the U.S.
- Travel to Canada from Europe and other overseas countries has been increasing and this trend is likely to continue.
- The number of Canadians travelling to the U.S. and other countries has been increasing annually and this trend will continue, which means Canadian tourism operators will have to more actively compete to maintain or increase their share of the market.
- As travel costs increase, trips will be more strongly purpose oriented with two results. Group A - go less often, travel further and stay longer at destination (this fits with increasing sales of home entertainment goods). Group B - more frequent short trips and fewer longer ones.
- More people are expected to fly over long distances and use rental cars to arrive at their final destination.
- More group travel by air, bus and train.

6. Accommodation/Attractions

The following patterns are emerging with regard to accommodations and attractions:

- More emphasis on low-cost overnight accommodations.
- More emphasis on tourist/recreation-destination complexes designed for multiple use and diversity of activities year round.
- Fewer accommodation nights with friends and relatives, more in commercial facilities.

*Inter-city Highway Passenger Transportation Sector - Technology, Efficiency and Productivity, prepared for: The Transportation Development Agency, Ministry of Transport, Montreal, P.Q., by: N.D. Lea and Assoc., Oakville, Ottawa.

- New emphasis on controlled environment facilities, such as year round destination resorts.
- More facilities and services catering to the over 65 age group.

7. Resource Use

Several aspects of resource use and management have important implications for the future of tourism. They are:

- Increasing emphasis on protecting and managing natural, environmental, cultural and historic resources.
- Hunting and fishing will be more strictly regulated and expensive.
- Problems of cost, availability, regulations and servicing will result in less private cottage development. Three trends will develop:
 - People are buying trailers and mobile homes to put on leased sites.
 - More middle and upper income people will buy hobby farms.
 - Development of leisure and Vacation Villages complete with commercial and recreational facilities.

D. SUMMARY AND MARKET DEMAND ESTIMATES

This section draws conclusions as to the areas of likely demand and their implications for tourist facilities development as well as preliminary estimates of the magnitude of the market. Some of the conclusions and estimates presented here must, of necessity, be general in nature. Opinions as to the interpretation of the facts presented in the preceding sections will vary, however, the resolution of these questions raised must await detailed assessments of the projects and opportunities.

In order that the conclusions and estimates made may correlate with the supply analysis, this summary is organized under the headings used in the Support Services section of Appendix C. In particular, the general types of facilities for which demand trends are prepared have been categorized under the following headings:

- roofed accommodation
- campgrounds
- cottaging
- attractions

1. Roofed Accommodation

The present supply of roofed accommodation is presented in detail in Appendix C. For both Zones, there are some 9,100 rooms (5,500 in Trenton-Cornwall Zone and 3,600 in the Renfrew-Kingston Zone). These rooms may be easily divided into those located in urban areas and catering primarily to commercial traffic and those located in more rural areas catering primarily to tourist accommodation usually related to recreation opportunities.

i) Urban Roofed Accommodation

The urban oriented roofed accommodation is composed of facilities such as hotels, motor inns and motels. These facilities are dependent upon the volume of travellers into and through the area who will require overnight accommodation. They also depend on the size of the local market for support of not only the accommodation services, but also the restaurant, bar and meeting room facilities. In the market profiles presented earlier in this Appendix, it can be seen that traffic to the Zones is increasing. Projections based upon past trends indicate a long term (to 1991) growth in trips to the Zones of between 3.5 and 4.0%. (See Tables D-4 and D-5). This growth, if projected for 5 years, represents a total increased demand of 20%. The distribution of visitor traffic as measured in total trips emphasizes the importance of the work related trips. This emphasis can be more clearly seen by comparison with the volume of social, recreational and other trips which does not include work related trips.

Population growth projections have been presented the Market Profiles section of this report. These projections indicate growth rates of between 0.8 and 1.5% (a 5 year growth of 4 to 8%). In order to give an indication of those people who might use facilities on a regular basis, an estimate of the population within day use range of the Sub-zones have been made. This has been estimated as the population within a 75 mile radius of the Sub-zone boundaries. (See Table D-2). This method tends to favour the larger Sub-zones by giving them a larger area. The resultant figures do, however, highlight those Sub-zones which are within close proximity to large urban markets. On a Zone basis the Trenton-Cornwall Zone had some 2 million people within this day use driving range in 1976. The Renfrew-Kingston Zone had some 1.4 million people within a similar range in 1976. A total growth rate of 1.8% to 1991 can be translated into a 5 year total growth of 9%.

The growth in trips and population is augmented by a growth in conference and convention demand. New or expanded urban roofed accommodation should be designed to accommodate this growing market for meetings, seminars and conferences.

The size of the facility will be dependent upon the size of the local market and the type of facilities for which there is a demand in the local area. Thus, major urban facilities (up to 200 rooms) are considered in the Kingston and possibly Cornwall area because of the present concentration of services and the high traffic flows. Kingston in particular represents a key transportation mode equidistant from Toronto and Montreal. Present demand has been documented as 110,000 room nights*. During the next 5 to 10 years, it does not seem unreasonable to anticipate a growth in demand at 4-5% per year of this present demand and would result in a total demand of 140,000 to 180,000 room nights. This results in an additional demand for some 200 rooms during this time period, based on traffic projections alone. Additional sources of demand, as discussed above, should ensure success of a major hotel.

General demand, population and traffic suggest either smaller scale new facilities or expansion of existing facilities in the other urban centres in the Zone. Concentration on the focal point as identified in this report should be considered. These opportunities are referred to as Heritage Inns in the Opportunities section of this report.

* Room nights equal room supply times occupancy rate times 365 (days per year).

ii) Recreation-Oriented Roofed Accommodation

This type of accommodation has been limited to seasonal resorts, many of which enjoy good location and access to high quality recreation areas. The trends in traffic and population which suggest a general demand for roofed accommodation in urban oriented centres are applicable to the recreation oriented accommodation. For these facilities, the demand is less easily quantified because the potential user has other alternate areas and facilities to select from. Thus, the quality of the recreation experience, the quality and price of the accommodation and the variety of facilities in the area will be important in the success of new accommodation units.

To provide an indication of the present usage rates, a calculation of the present number of room nights in the Zones was prepared. This calculation was made for Ontario and U.S. visitors to the Zones only. It was based upon the information presented in the previous section in this Appendix on tourist characteristics. The calculation divides the total number of visitors from Ontario and the U.S. according to the type of accommodation and then distributes this number of visitors by the length of stay to produce an estimate of the number of room nights. It must be remembered in using this estimate that it is heavily seasonally weighted and includes visitors staying in urban facilities as well as resorts. It does, however, provide an indication of the magnitude of the present market which in the Trenton/Cornwall Zone was 570,000 visitor nights, and in the Renfrew/Kingston Zone was 150,000 visitor nights. This results in a total estimate of 720,000 visitor nights for both Zones. It was felt prudent to subtract from this total the present room nights in the Kingston area*. This results in an annual usage rate of 570,000 visitor nights. At annual traffic growth rates of 3.5% to 4%, a 5-year growth of 20% is possible. This suggests an increase in demand of 120,000 visitor nights. This suggests a demand for between 150 and 200 rooms throughout the Zone. No data was available to indicate visitor preference to the use of roofed accommodation or the sensitivity to the present pricing of accommodation. It may be assumed that either less expensive or higher quality accommodation will generate higher use.

* A conversion factor of 1.4 was used to translate room nights to visitor nights.

2. Campground

Camping throughout the Zones represents an inexpensive alternative form of accommodation for many tourists. An increasing specialization in types of campgrounds was noted during our interviews. This specialization generally suggests three categories:

- transient oriented campgrounds
- family oriented camping
- year round and/or seasonal lease basis

The transient oriented campgrounds are presently being served primarily by the public sector. They relate to day use and weekend use and are primarily being used by vacationers who are travelling through or by residents within the Eastern Ontario area. Family camping is usually characterized by campgrounds which specifically cater to children and youth activities. The campgrounds themselves, although seasonal in nature, generally take on a very strong sense of community which can extend into the management aspects of the campground itself. The year round and seasonal lease basis for camping results from a number of factors, two of the most significant being the lack of alternate cottage accommodation because of increasing costs of lakefront property and cottage construction, and the difficulty of arranging storage for campers and trailers in urban centres.

Camping party nights for campgrounds have been calculated in a similar manner to the visitor nights for roofed accommodation. The data presented in Part A of this Appendix on number of visitors accommodation split, and length of stay has been combined to provide an estimate of 675,000 camping party nights in Trenton-Cornwall and 470,000 camping party nights in Renfrew-Kingston. A 100 site campground operating 3 months at an occupancy rate of 35% would generate 3,150 camping party nights.

Recent studies indicate occupancy rates of 35-40% over 3 months. This low rate is in part due to the peak usage rates associated with weekends and good weather and the short peak season in these Zones of 6-8 weeks of prime camping weather.

The trends in population growth and in growth in trips to the Zones (3.5% annually) which were noted in the roofed accommodation section, apply equally to campground growth. In addition, the emphasis on the environment and environmental quality and the recent interest in the back-to-nature movement would suggest a growth in camping usage of some 250,000 camping party nights. This growth may be accommodated by new camping sites, expansion of existing campgrounds and rising occupancy rates.

Campgrounds can also provide an inexpensive form of accommodation for tourists and as such the location of campgrounds in relation to the corridors, recreation roads and clusters of attractions could provide both an interim accommodation facility as well as ongoing accommodation for tourists in the Zones.

3. Cottaging

In Ontario the trends to cottaging and hobby farm development remain strong. At the present time, there are some 150,000 cottages in Ontario. Of these, approximately 24,000, or 16% of the provincial total, are located in the Zones under study. Present construction data indicates construction of approximately 2% per year or 480 cottages. The actual increase in supply, however, is somewhat less than 2% due to the conversion and the loss of cottage units due to demolition and fire. This construction rate has been slowing during the past 5 years as a result of the following factors:

- rapidly increasing costs of cottage purchase and ownership
- increased travel costs
- capital gains tax
- extensive and severe municipal and environmental restrictions on cottage development.

Present trends indicate that a new flux of potential cottage owners are beginning to make their demands known in the cottage market. This new influx is primarily a result of the post war baby boom reaching an age when their primary urban accommodation needs have been satisfied and they are now looking for a second home or retreat in the more rural areas.

It is difficult to place numerical limits upon the demand. A survey conducted in 1968 indicated that 11% of Ontario households owned cottages. A more recent survey (1974) of selected urban markets in Ontario indicated that the incidence of vacation home ownership among higher income respondents increased to 16%. Thirteen percent of the non-owners in the higher income sample expressed interest in purchasing a vacation home. The majority of those are likely purchasers (by virtue of being in the higher income brackets) and they state that they will probably buy within the next five years. Most, however, will probably buy a lot and build their vacation home on it.

There are 16 urban centres in Southern Ontario from Hamilton to Cornwall (inclusive) that contain a total of 698,000 households, of which 365,000 had disposable incomes of \$10,000 or more in 1975. Assuming 13% are planning to buy a cottage over the next five years, this would mean that the major urban-centered market for rural cottages will be 47,500 units or 9,500 units per year.

Using the same approach as above and applying it to that portion of the Quebec market within about 175 miles from Gananoque, the annual market for cottages will be in the order of 9,000 units per year.

Therefore, total unsatisfied demand for cottages in Ontario and Quebec within 175 miles of Gananoque is 18,500. Including U.S. demand, this estimate would be well in excess of 20,000. This represents a serious shortage in available cottage sites of at least 5,000 sites on a provincial basis. This would translate into a shortage in the Zones of at least 1,000 sites within the next five years. This shortage will increase over time.

Also of major significance is the fact that the bulk of the good cottaging sites have been already used in the preferred areas such as Rideau Lakes and the Thousand Islands. An alternate to cottage development such as condominium resort development would tap this shortage in supply as well as cater to potential new markets for recreation-oriented development. Location and access to areas with high recreation potential would be essential.

4. Attractions

The present supply of attractions throughout both Zones is limited primarily to large scale publicly owned and operated establishments as well as a number of small attractions which are generally scattered throughout both Zones. The present trends in increased leisure time and shorter work week and in the growth in local and market area population and traffic flows indicate an increasing potential demand for attractions. Recent examples of both large scale and smaller scale attractions throughout other areas of Ontario, Quebec and the United States provide examples of both successful and unsuccessful commercial attractions.

Part 2 of Section A in this Appendix provides a clear indication of the concentration of population within easy access of the St. Lawrence Valley Sub-zone. The success of a commercial attraction is heavily dependent upon the population within a convenient driving distance. A population of 2.2 million people is projected within one to two hour's drive of the St. Lawrence Valley Sub-zone. Much of the Renfrew/Kingston Zone is within easy access of populations in excess of 1 million people.

The opportunity for large scale commercial attractions is relatively limited due to the investment involved. Only two to three such attractions should be considered within the timeframe of this Study. Large commercial attractions (those greater than \$500,000 capital investment) should be located within easy access of major population centers. The ability of the attraction to capture sufficient market will be dependent upon alternate attractions and opportunities available to the market residents and the promotion and quality of the attraction itself.

Attractions of a smaller scale are generally dependent upon a mix of existing traffic and local population. The type and scale of the attraction will be heavily dependent upon these two factors. Opportunities exist for small scale commercial attractions throughout both Zones.

The market analysis, although an important input to the selection and development of opportunities for this study, represents only one of several sources of opportunity identification. Further analysis for specific opportunities is provided in Appendix A. These studies were not intended to preclude detailed feasibility studies of the suggested opportunities and ideas. These detailed studies will be required to determine the particular characteristics and to examine the size and relative ease of capture of the specific markets involved.

APPENDIX E

COMMUNITY CONTACTS PROGRAM

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'APPENDIX E

COMMUNITY CONTACTS PROGRAM

A major input into this study has been the Community Contacts Program. In this program, close to 150 community and local government personnel were contacted. A great deal of important local information and views on the existing tourism situation have been gathered as well as suggestions for tourism development.

The following sections provide an overview of the general comments received through the contacts program. These comments are organized by Zone and Sub-zone. Following each Sub-zone section a number of the comments have been presented in a manner as close to verbatim as possible. A partial list of the people contacted follows this presentation. It should be noted that although listed by Sub-zone, certain of the contacts apply to more than one Zone.

A. TRENTON/CORNWALL ZONE

The general consensus derived from the wide cross-section of interviews may be summarized in the following statements:

- a. the industry itself, with government assistance, must make every effort to become more price competitive with the United States;
- b. cooperation and support between various levels of government is essential for expansion of the industry;
- c. an improved availability of investment capital is critical to development;
- d. tourism development must be coordinated with existing facilities to promote both higher volumes, more repeat visitors and longer duration of stays;
- e. the importance of cooperation in marketing and promotion at the Subzone level cannot be overlooked.

1. Quinte Sub-zone

General

This Subzone includes the communities of Trenton, Belleville and Napanee along with Prince Edward County. Although the Subzone has a significant tourist trade at present, the general opinion is that much greater potential is available.

A number of developments are underway in the major centres. The City of Belleville is developing the area of the harbour front and doing some redevelopment in the central area of the City. The Town of Trenton is developing a twelve acre park but this project is progressing slowly.

The major concerns of persons in this area are that the tourist season is so short that it is difficult to get full-time operators and that there is not enough significant private investment in the tourist industry. People do not stay in the area either due to the lack of quality accommodation and entertainment facilities, or relative ease with which the area can be overlooked and bypassed by traffic on Highway 401. Generally it was felt that if greater incentives can be developed in order that private investment is increased, and if programs can be developed for the benefit of the operators, tourism in this area should become more important.

Comments from Interviews

City official, Belleville

- Availability of money is a problem; the federal or provincial government should retain the offering of low interest loans
- Tourism in the area has not realized its potential

Golf and Country Club owner/operator

- Business growing each year
- Good location between large urban centres attracts tourists
- Require better accommodation and eating facilities in the area
- Tourism has great potential for the area's future

Elected official, Belleville

- Tourism industry will become more significant

Member of Belleville Chamber of Commerce

- Tourist operators must cooperate
- Educational assistance needed for operators

Official, Napanee

- Highway 401 bypasses the area taking potential tourists away
- Tourist season is too short
- More attractions needed to keep tourists in the area

Local Conservation Authority

- Cottage development should be halted
- More facilities (entertainment, shopping, etc.) needed
- Local municipality should work closely with the Conservation Authority to coordinate the development of resources

Motel operator, Napanee

- Need better dining, accommodation and entertainment facilities
- More historical development

Trailer Park operator, Napanee

- Provincial Parks provide too much competition
- Not sufficient attractions in the area
- Signing regulations along King's Highways are overly restrictive
- More advertising in U.S.

Official, Trenton

- The Town has been lax in developing tourism but is now actively involved
- Financing is the biggest problem and it is difficult to get private enterprise involved

Member, Chamber of Commerce, Trenton

- Too much red tape for tourist operators
- More facilities needed
- Great future potential

County Warden

- Large areas of shoreline are privately owned eliminating development

Planner, Conservation Authority

- Insufficient natural features and tourist attractions
- More and better accommodation required
- Cottage development should be more controlled

Planning Board Director

- Require more accommodations

Park Operator

- Requires more government assistance
- More provision in Zoning By-laws for tourism areas
- Because of poor soil, tourism will become more important than farming in some areas

Resort operator

- Tourist operators lack expertise
- Financing is difficult to get
- Tourist season too short for big investments
- More assistance for promotion is required

Resort operator, Prince Edward County

- Over-crowding in Provincial Parks on long weekends
- More government control needed to control unique and natural areas for public use

Development Director

- Too many tourist operators are part-time and poorly trained
- Financing is a major problem
- Too much shoreline is privately owned

Campground operator, Prince Edward County

- Too many part-time operators
- Need more dining and entertainment facilities
- Need less strict liquor laws

2. Kingston/Wolfe Island Sub-zone

General

Kingston/Wolfe Island occupy a central position in Eastern Ontario. This central position is important to a tourism strategy. Among those contacted, many implied an understanding of this fact. Many recognized the unique historical and architectural heritage as a tourism resource of the area. It was generally felt that promotion of the City and the surrounding areas needed to be more specific. There appears to be many awakening interests in the Sub-zone which if fostered would greatly assist in recognizing and building the role of tourism for the City and the two Zones of which it is an overlapping part.

Of the major concerns that were voiced by those that were contacted, many pertained to the economic feasibility of operating in Kingston and attempting to compete with the facilities offered on the other side of the St. Lawrence River. Another concern that was readily apparent was that a lot more could be done to promote tourism in the area. Many operators felt that Queen's Park and the Ministry could be doing more to promote Ontario as well as specifically promoting the Kingston area. In this regard, the idea of a cost sharing agreement, between the local tourist promoters and the Ministry, was suggested by some operators. A further concern in this vein was that the existing promotion was not being adequately directed. It was suggested that the Montreal-Quebec market was one that has great potential but is not being sufficiently exploited at this time.

Wolfe Island is a major island which, because of limited access, has been bypassed to some extent by other development. It has significant potential for development, which can generate traffic and can cope with access problems. It is strategically located with regard to access and has sufficient area and features to warrant serious consideration for certain special types of development. A bridge access has been reviewed but no action is likely in the near future.

Comments from Interviews

Kingston motel operator:

- A vast number of persons within a day's travel from Kingston not aware of its attractions.

Travel agency, Kingston:

- Very little promotion material available
- Caution must be taken to keep the quality of fishing high

Tour operator, Kingston

- Problems of insufficient promotion
- Wolfe Island has potential for development
- Government and the industry must cooperate

Wolfe Island

- No specific attractions
- Insufficient accommodation available
- Government property should be developed
- Pollution of the river and lakes must be controlled
as clean water is what attracts tourists

Tourist and Visitor Bureau

- Government assistance could help to promote boat related activities in the area

3. Thousand Islands Sub-zone

General

Among those contacted, it was generally felt that the Thousand Islands area derives a considerable amount of income from tourism but there is a shortage of major attractions in the area. Inequalities of cost between the U.S. and Canada, particularly for marinas and accommodations, were a constant source of comment. A second topic which generated much discussion was the expansion of the National Park. Most contacts seemed to be critical of the expansion while recognizing the uniqueness of the area and the importance of the natural environment.

Many people contacted felt there is relatively little use being made of the numerous islands for tourism purposes at this time. Many islands are privately owned and have seasonal residential dwellings on them. Some large tracts of land both on the mainland and on the islands are owned by the St. Lawrence Parks Commission.

Generally it was felt that the Thousand Islands area has many features that attract tourists. The very rural atmosphere and the magnificent interface between the St. Lawrence and the rocky mainland were suggested as the attractions. Many contacts felt that these features are not sufficient to keep tourists in the region for extended periods. The short duration of the season is a further complication in that many operators are essentially part time. Many cited the seasonal nature of operations as a constraint to the quality of service that is offered.

The development of year round facilities has been suggested by various persons in the area but at this time adequate incentives for such a major investment appear to be lacking.

Comments from Interviews

Marina operator

- Cost of operating is far higher than their U.S. counterparts
- Too many campgrounds already; should try to attract tourists that are more beneficial to the area
- Thousand Islands Parkway should be groomed

Motel operator

- Weed problem and decline in fishing quality
- Season too short for major development
- Winter facilities needed
- Costs are too much higher than in U.S.

Travel Association Director

- Need facilities that will hold people for one or two weeks
- Need for a major attraction, but the season is not long enough
- Too expensive compared to U.S.

Campgrounds operator

- Parks Canada will not let anyone know what they are planning
- Major attraction required; should be on mainland
- Winter facilities should be developed

Restaurateurs, Brockville

- Historic nature of the area should be emphasized
- There might be merit in considering a major convention centre complex
- Further development of yacht club would be beneficial

Marina operator, Brockville

- Too much administrative red tape for private developers to be able to develop waterfront property
- Major cost differential between Canada and U.S.
- Tax and duty reforms needed to reduce inequities between local operators and those in U.S.
- Overall development plan is essential to coordinate the lending of funds in a meaningful manner

4. St. Lawrence Valley Sub-zone

General

This Subzone encompasses that area of the St. Lawrence north shore from south of Prescott to the Ontario-Quebec border northeast of Cornwall. The major hinderances at this time seem to be the lack of specific attractions in the area, the high prices compared to those on the other side of the river and possibly, the lack of promotion being undertaken by the area's communities. Many contacts recognized that coordinated development in the urban centres which sought to review and strengthen the character of the urban centres, has and will continue to be a strong community based tourism resource.

Fishing was cited as an historic factor that in the past has attracted persons to the area but the quality of fishing has deteriorated in the past few years and more reliable attractions are required as a basis for the industry. Many contacts realized that tourists must be enticed to spend a number of days in the region as opposed to passing quickly through. There is presently little to keep these persons. Upper Canada Village near Morrisburg is popular, but this is an exception. The area cannot rely upon a single attraction, but apparently there are problems of financing and in some areas there is insufficient land available.

Comments from Interviews

Councillor, Town of Prescott

- Waterfront development in Prescott has all sorts of possibilities
- Use should be made of cultural heritage
- All efforts should be made to eliminate the cost differential between Canada and U.S.

Member, Chamber of Commerce, Prescott

- American visitors are amazed at the high cost of living in Canada
- Major attraction needed to create a description; reliance upon history is not enough

Motel operator

- distinctive decline in trade in last two years
- more promotion needed in the area

Resort operator

- lack of adequate customs facilities for boaters
- winter sports should be encouraged

Innkeeper, Cornwall

- promotion of winter activities required
- suggest opening up tours of the hydro dam

Member, Chamber of Commerce, Cornwall

- avoid developing more campsites
- too many arms of the Provincial government are involved in tourism in the area

Motel operator, Cornwall

- food and travel costs are too high
- too much red tape and forms for the private entrepreneur
- there are quite a few attractions, but they are small and uncoordinated

County Clerk

- if hotel and motel operators were better organized, they could improve their advertising
- more boat docking facilities are needed
- local municipalities have lost their involvement in tourism to the Seaway Valley Regional Tourist Council

Marina operator, Morrisburg

- either long term leases on government land is required or more mortgage money must be made available
- tourism will become increasingly important to the area
- the Provincial Government is doing nothing for boating; they could put docks on local islands

Member, Chamber of Commerce, Morrisburg

- major problems are that bank financing is unavailable and that room rates and gas prices are too high
- local Hoteliers Association needed to help stabilize rates
- small business operations should be encouraged and assisted by the Provincial Government

Member, St. Lawrence Tourist Council

- too few natural attractions
- cost of everything is so much higher than in the U.S.
- not being able to put signs on Highway 401 is a problem

B. RENFREW/KINGSTON ZONE

The general consensus gained from those contacted in the Renfrew/Kingston Zone may be summarized in the following statements:

- (a) The importance of promotion cannot be overlooked
- (b) Cooperation between various levels of government is essential for expansion of the industry
- (c) The industry must take every available opportunity to become more competitive with the United States
- (d) The natural resource base is a significant asset which must be preserved and strengthened if possible

1. Rideau Lakes Sub-zone

General

The major focus of tourism in this area was recognized as the Rideau Lakes complex and their associated waterways and canal systems. This area has had an important tourist trade for many years. As would be expected, the majority of activities are related to the water -- fishing, boating, cruising, canoeing, sailing, swimming and similar activities. The majority of the facilities have been established for some years and although several are undergoing renovation no major developments have been initiated recently.

Many contacts expressed the opinion that there is little doubt that the demand of tourism in this area will continue to increase. Similarly, the importance of tourist dollars to this area was felt to be very significant. This recognition is apparently growing.

Presently no major projects are anticipated although a number of existing operators have indicated a willingness to expand. This particularly applies to marina-type operations. A major proposal for a year round hotel and golf course on Beupre Island was recently submitted for Government approval but it appears that this project is presently shelved.

Those contacted felt that the majority of tourists in this area are from the Ottawa area and from locations in the United States with smaller numbers both from Toronto and Montreal. Many felt there is an increasing trade from Quebec and a dropping off in numbers of visitors from the U.S.

The major concern of the present operators is the one of costs of operation and the importance of competitiveness with U.S. operators.

Comments From Interview:

Rideau Ferry

- There is a charge to go through the locks which has caused a decrease in boat traffic
- Average age of tourists is older; therefore, facilities must be geared to this age group, but in order to attract younger people, new facilities should be introduced
- Promotion by Government is very poor

Merrickville

- Historical potential; feels there is a chance to become a "living Upper Canada Village" due to the history and the housing types
- Heritage Committee should be considered

Chaffey's Locks

- Problem in regaining the confidence of the travelling public that they will receive value for their dollars
- Problems with weeds
- Need more private investment, but economic conditions make it impossible for a business that is open only part of the year to survive.
- We just don't compete with parts of the U.S.

Newboro

- Weeds killing the lakes; must be cleaned
- Lack of Government promotion
- Drop in boat traffic recently
- Local Municipality should play a much greater role in developing tourism.

Perth

- Need for more docking facilities on Tay Canal system.
- Insufficient promotion and poor coordination in the promotion for the various events

Motel, Perth

- Criticism of Eastern Ontario Development Corporation (EODC) for apparently not supporting the area
- Provincial Government should more actively support promotion
- Motel improvement is severely hindered by taxation.
- Felt there was poor understanding by the Federal Government of Tourism at the local level

2. Carleton Place/Almonte Sub-zone

General

In the Carleton Place/Almonte region, the major attraction for tourists is the scenic setting in close proximity to a major metropolitan area easily accessible by Highway Nos. 7, 15 and 44.

Many of those contacted recognized this Sub-zone as a unique overlap area between the strong urban orientation of the Ottawa-Hull area and the rugged rural areas in the Kaladar Frontier. The Sub-zone caters to the tourist and commercial accommodation needs of both areas. It also presents to the Ottawa day tripper an accessible rural area. Recent development of crafts and wood working industries have potential because of this proximity. Actual development of tourist service facilities will require careful planning and must take account of the Ottawa market influence.

Comments From Interviews

Motel, Carleton Place

- Very pleased with financing help from Eastern Ont. Dev. Corp.
- Importance of providing something to attract and stop tourists as opposed to keeping on driving; highways need to be cleaned up

Carleton Place

- Too much emphasis can be put on tourism as it is only a two-month season
- Promotion of tourism with regard to Mississippi Lake is a conflict as it is jeopardizing the water quality
- Lack of boat launching facilities
- Problems with delays caused by red tape when dealing with Provincial Government
- Requirement for marina and accommodation

Campground, Mississippi Lake

- Boating should be controlled on the lake, maybe by an Ontario Provincial Police cruiser
- Rowdiness is a significant problem.

Conservation Authority

- Great pressure being put on the available water resources in the area
- There are a number of old mills that, if restored, would be an attraction

3. The Ottawa River Valley Sub-zone

General

The Sub-zone parallels the Ottawa River and Highway 17. The Sub-zone is easily accessible from the Ottawa market, however, it suffers in that it is not on a major tourist traffic route. Much of the present service facilities (accommodation) are heavily oriented to commercial traffic. Tourists to the area generally develop strong ties. The present attractions are heavily dependent upon the local market. This situation continues for much of the tourist-oriented activity despite concentrated efforts and studies to promote tourism. The recent announcement of a major tourist attraction, Timbertown, near Renfrew is viewed by many as an important step to establishing the area as a tourist destination.

Comments From Interviews

Motel, Pembroke

- Major problem was the low number of tourists in recent years;
- Little to attract persons in the winter
- Lack of access is a problem
- Felt Government controls were becoming far too regulated and either fewer controls or a coordinated system of applying controls was needed
- The area offers a natural rural life style and this must be presented to the tourists
- Sees a definite need for a night school type course, for operators, to offer them skills in operating tourism establishments
- There are benefits to be had from development of a local organization of tourism operators

Campground Operator

- Sees Timbertown project as the base of future development.

Motel, Renfrew

- Enthusiastic about Timbertown proposal
- Attraction of clean water in the area
- A need for coordinated promotion and education of tourism operators, with particular reference to financing and available Government funding
- A problem is the lack of priority given to tourism, as opposed to industry by local and county governments

Chamber of Commerce

- Requirement for urban experiences (such as movie house or arcade) as well as rural attractions
- Critical of local operators who appeared to be neglecting promotion
- Immediate need for picnic areas, public park space and campsites.

County of Renfrew

- Need for education of the operators with respect to potential and development.
- Tourism is definitely increasing in importance but must be encouraged and therefore, requires incentives
- Role of Provincial Government is multi-purpose, including policy preparation, education for operators, and provision of grants. There is too much red tape.

Town of Arnprior

- Agrees with Timbertown concept
- Possibility of using winter works program for developing areas for recreation
- Provincial Government subsidies would be beneficial;
- Citizen groups could be encouraged to develop ideas to attract tourists

Private Attraction Owner

- Few full time operators in the area
- Labour costs make maintaining a facility costly
- Need for campgrounds at reasonable rates
- Requirements for more swimming areas
- Sees a need to promote in Western Canada

Trailer Park Operator

- Found financing through Federal Business Development Bank too difficult;
- Critical of competition between Government Parks and private entrepreneurs
- Tourist Bureau should use older, more experienced people who have more to offer than just handing out pamphlets
- Small operators should be maintained as they can offer more and the big developments will overdevelop the area and ruin the natural characteristics

4. Madawaska Highlands Sub-zone

General

This Sub-zone contains areas of particularly splendid scenic and landscape resources as well as several existing and several proposed potential downhill ski facilities. Accessibility to both Toronto and Ottawa markets was stressed by those contacted, although it was recognized that there is a lack of a quality development to promote large traffic volumes. Although it was felt that the potential exists for significant development, investors have failed to capitalize on these opportunities.

Comments From Interviews

Calabogie Operator

- Poor road signing and lack of facilities
- Poor promotion and communication
- The Ski Parks are an obvious attraction, but there is little else
- Tourism is extremely significant to the area's economy and requires more direct aid, both culturally and financially

County of Renfrew

- Cohesive promotional effort is required to attract tourists and an expanded base is needed
- Renfrew County has potential for four season recreation base, but all areas require promotion and development
- Snow mobiling and cross country skiing could be further developed in conjunction with the Ministry of Natural Resources and their program of Crown Land Management

Town of Renfrew

- Private cottage development on lakes is still available
- Calabogie area offers year round utilization with skiing, hunting, fishing and cottaging

Town of Renfrew (Continued)

- Advent of Highway 417 would provide an important improvement in access and probably a consequent increase in tourism traffic;
- Important that the basis of tourism has to be from the local residents themselves, and that they be involved not only in administration but also in the use of the facilities.

Town of Arnprior

- The tourist industry of the Madawaska River area has important significance to Arnprior and surrounding area.

Craftsman, Burnstown

- Financing is a major problem for people in the Arts and Crafts field;
- Suggests that alternate means be established to make available relatively small amounts of capital, up to \$10,000 or so.

Calabogie, Operator

- Winter sports have great potential, but there is a problem with poor access, and consequently they can't compete with other areas;
- Expressed concern over difficulty in borrowing large sums of money through the Dept. of Regional Economic Expansion.
- Need for an après-ski facility; without this aspect the venture is purely a ski area;
- Recommends that tourism should not be treated as a "small business";
- Suggests that a hotel, utility area and crafts shops be introduced; the former would attract those with more money to spend and the middle class would fill in the extras.

Campground Operator

- Feels that the Government literature and guides do not provide them with a useful service;
- Extremely concerned about the fact that the Government is a major competitor;
- Inconvenience of inspections, etc. - found a problem developed when there was not one person to go to/ - conflicts developed between various government departments;

Campground Operator (Continued)

- Many government programs or taxes adversely affect operators by raising costs
- Need for amusement in the area to draw tourists into the area.

Calabogie Township

- Need for overnight accommodation particularly with regard to skiing and snowmobiling
- Require a Conservation Authority to change the area
- The municipality is limited in its effectiveness by limited funds and dependence on transfer payments.
- Roads are the main problem and the key to this area's tourism attractiveness is the roads.

5. Kaladar Frontier Sub-zone

General

The rugged landscape of the Kaladar region was felt to be the basis of the tourist attraction of this area. The wilderness aspect of this region attracts many people who either come specifically for the fishing and hunting or for the scenic attractions offered by the abundance of lakes. There are a number of established resorts in this area, some of which are considering limited expansion but there are no major projects anticipated. Recently there has been noted an apparent decline in the fish stocks of some lakes despite restocking by the Ministry of Natural Resources and, in addition, the hunting season has recently been reduced from two weeks to one. These facts were felt to somewhat shift the tourism emphasis from these activities to activities such as cross country skiing and snowmobiling. It was felt that there are opportunities to develop both these activities.

Several contacts have noticed that government controls on foreign ownership are having the effect of reducing the number of American cottage owners in the region. Presently the majority of tourists are from the Kingston and Eastern Ontario regions and American vacationers account for approximately fifteen percent of the longer term tourists, as opposed to the day trippers or weekend vacationers.

Some of the concerns of the operators in this area are those concerns that appear to be common to the majority of people contacted during this study; namely the problems of coordinated development and insufficient promotion. In addition it is noted that the restrictive nature of development controls, along with the fact that there is limited land available, makes the future look uncertain. However, with increased promotion and the growing Toronto market, most operators felt the area would increase its tourist trade particularly if the ever-present coordination problems between different government agencies and local entrepreneurs can be resolved.

Comments From Interviews

Central Frontenac Board of Trade

- Significant problems are:
 - . Lack of accommodation;
 - . Lack of good restaurants;
 - . Disinterest by municipalities in promoting tourism;
 - . Lack of funds for promotion
- Tourism in the backbone of this area's economy.

Inn, Tavern Operator

- The majority of tourists are older and attractions are needed to draw more families to the area;
- Cost of accommodations, food and gas are high in Canada and therefore, fewer U.S. tourists are expected each year;
- Drop of tourist numbers also due to lack of fish and increased weeds in the lakes.

Resort Owner

- The area is basically depressed and in need of development;
- Strong recommendation for year round facilities, especially to include cross country skiing and associated restaurants and facilities.

Hotel Owner

- Hunting is deteriorating and therefore, attracting fewer persons;
- Unimpressed with local government's handling of matter.

Cloyne

- Problems with decreasing fish stocks and weeds in the lakes;
- Still more potential for snowmobiling in the area.

Tourist Council Representative

- Operators are not able to provide expanded services due to smaller staff caused by minimum wage laws;
- Costs of financing makes it difficult to make a profit;
- Important that permanent residents be encouraged to provide services for the tourist industry.

Sports Centre

- Feels that existing severance policy requires excessively large lots;
- Suggests that the Government should take over the provision of Liability Insurance for tourist operators as it is very expensive.

Conservation Authority

- A great pressure is being put on the available water resources.

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APPENDIX F

POLICY FRAMEWORK

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APPENDIX F

POLICY FRAMEWORK

Policies

It will be apparent to any tourist operator, as indeed to most persons, that the granting of permission to go ahead with any "development" is dependent on numerous policies. The logical extension of a policy framework is regulations and regulations generally are synonymous with red tape and the consequent delays in implementation and approval.

It must be realized that the existence of policies at every level of government are essential so that development may be channelled in directions perceived as desirable. At the provincial level, policies are required so that the Provincial Government may guide and control development and changes in the best interests of the entire province. Policies are general in application. The more detailed application is the responsibility of the progressively lower levels of government. Provincial policies themselves are a progression from federal policies dealing with the application of the federal and provincial policies in that specific region and, still at a lower level, local policies. These are the final implementation hurdle and they, in effect, say that despite the fact that certain kinds of development may be permissible within the federal, provincial and regional policies, it may be seen as undesirable at this particular time in this particular location.

There are numerous areas in which policies, by whatever government level, exert an important influence on tourism. This is because tourism itself is an interdisciplinary field in which successful development is dependent upon decisions relating to such areas as land use, employment, regional development, transportation, conservation, preservation of historic and cultural buildings, and many others.

Probably the greatest amount of provincial legislation that is encountered by tourism developers relates to the preservation of the natural environment. Indeed the natural environment is of great importance to the tourist industry, but acceptable standards must be formalized in order to balance its preservation and the development of certain types of tourist facilities. On the provincial level, there are at least six ministries that have Acts (that enforce policies) that relate to the preservation of the natural environment, as well as other aspects of tourism. The following table indicates the volume of legislation in this field.

Ministry of the Environment:

Environmental Protection Act
Ontario Water Resources Act

Ministry of Health:

Public Health Act

Ministry of Housing:

Planning Act

Ministry of Industry and Tourism:

Tourism Act

Ministry of Natural Resources:

Provincial Parks Act
Public Lands Act
Beach Protectors Act
Conservation Authorities Act
Wilderness Areas Act
Lakes and Rivers Improvement Act
and many others

Ministry of Treasury, Economics and Intergovernmental
Affairs:

Local Improvement Act
Municipal Act
Parkway Belt Planning Act

Ministry of Culture and Recreation:

Ontario Heritage Act

In addition, a number of the above ministries have Acts that apply specifically to certain areas, such as the Niagara Parks Act, the St. Lawrence Parks Commission Act and the Niagara Escarpment Planning and Development Act. There are certainly other Acts affecting tourism directly and indirectly.

In general there are numerous legislative tools that enable a community to exercise considerable control over such items as land use and development, but final implementation can only be achieved by the adoption of by-laws and such at the local level. A good example of this concerns the preservation of cultural and historic buildings. The Ontario Heritage Act provides the basis on which any community can get involved in building preservation and a Heritage Conservation District Plan can be developed by the implementation of by-laws passed under both The Ontario Heritage Act and The Planning Act.

The following Figure provides an indication of the agencies, federal, provincial and local, that have an impact on certain types of developments. The Table is set up such that it can be seen in what capacity each agency exerts influence. The accompanying legend indicates which agencies are involved in which aspect, providing financial assistance, regulatory capacity, publicity and promotion or one of the numerous others.

It can be seen that some potential developments are very much more strictly regulated than others and consequently the difficulties in developing these facilities are much greater. For example marinas have been cited by many tourism operators as an area which appears to be unduly regulated to the extent that there is so much time expended in negotiating with all the agencies that the tourism industry suffers. Operators do not resent the volume of legislation in itself but do resent the uncoordinated legislation necessitating contact with so many agencies, in order to either get the necessary approval or to get financial assistance.

Utilizing the example of a marina it can be seen that there are certain regulations to be adhered to, administered by the following agencies:

- National Harbours Board
- St. Lawrence Seaway Authority (where applicable)
- Transport Canada
- The Small Craft Harbours Branch of Environment Canada
- International Joint Commission (where applicable)
- Ministry of Revenue
- Ministry of Transportation and Communications
- Ministry of Housing
- St. Lawrence Parks Commission (where applicable)

Regional Level:

- Assessment Branch, Health Unit and Engineering and Planning Agencies.

In addition to these, there are additional contacts to be made with regard to financing, promotion, technical assistance and so forth. A formidable barrier of red tape is thus involved and development opportunities are often delayed or lost as a consequence.

Matrix Legend

et Education and Training

Denotes agencies that provide for the education and training of employees, employers and/or operational personnel related to the tourist industry and not for their own specific use.

fa Financial Assistance

Denotes agencies that provide any form of direct financial assistance to private tourism enterprises.

i Infrastructure

Denotes agencies that provide or assist in the provision of the infrastructure of the tourist industry.

o Operational

Denotes agencies that operate (and usually own) a tourist attraction and includes the planning and development as well as the education and training of their own employees.

p Planning

Denotes agencies that plan for the development of tourist attractions and the required infrastructure.

pp Publicity and Promotion

Denotes agencies that provide for means of publicizing and promoting the tourist industry.

r Regulation

Denotes agencies that play a regulatory role in the planning and development of tourist attractions and/or their operation and management.

ta Technical Assistance

Denotes agencies that provide staff, machines or methods to assist in the planning and development of and/or the operation and management of tourist attractions.

[illegible]

A. ACCOMMODATION	(1) Hotel/Motel
	(2) Campground/Trailer Park
	(3) Restaurant

0 INTEGRATED COMPLEXES
1) Year round sports/recreation

(1) Integrated full service
(2) Limited scale and service

APPENDIX G

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